

Housing Supply Overview

A Research Tool Provided by the Greater San Diego Association of REALTORS®

December 2025

U.S. pending home sales climbed to their highest level in nearly three years, rising 3.3% month-over-month, according to the National Association of REALTORS®. Economists polled by Reuters had forecast a 1.0% increase in contract signings. On a year-over-year basis, pending home sales advanced 2.6%, with both monthly and annual gains recorded across all four regions. For the 12-month period spanning January 2025 through December 2025, Pending Sales in the San Diego were down 1.3 percent overall. The price range with the largest gain in sales was the \$5,000,001 and Above range, where they increased 4.9 percent.

The overall Median Sales Price was up 0.3 percent to \$900,000. The property type with the largest price gain was the Single-Family Homes segment, where prices remained flat.\$1,050,000. The price range that tended to sell the quickest was the \$750,001 to \$1,000,000 range at 36 days; the price range that tended to sell the slowest was the \$5,000,001 and Above range at 75 days.

Market-wide, inventory levels were down 0.2 percent. However, the property type with the largest gain was the Condos - Townhomes segment, where they increased 10.0 percent. That amounts to 1.7 months supply for Single-Family homes and 2.5 months supply for Condos.

Quick Facts

+ 4.9%	+ 6.5%	- 0.1%
Price Range With Strongest Pending Sales:	Home Size With Strongest Pending Sales:	Property Type With Strongest Pending Sales:
\$5,000,001 and Above	3,001 to 4,000 Sq Ft	Single-Family Homes

Residential real estate activity in San Diego County, comprised of single family properties, townhomes and condominiums. Percent changes are calculated using rounded figures.

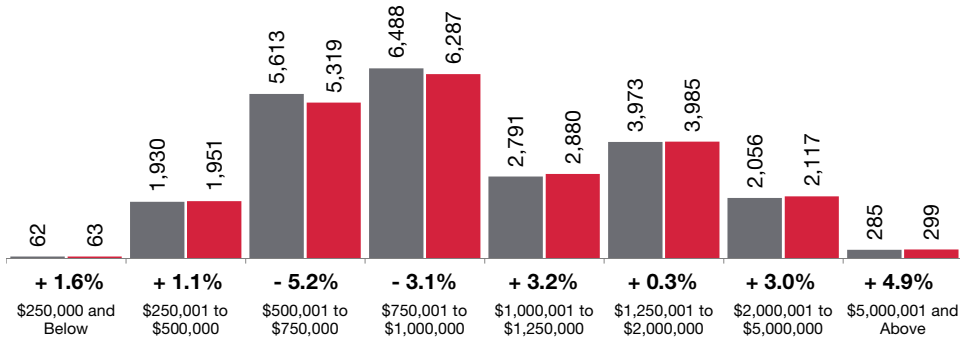
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Pending Sales

A count of properties on which offers have been accepted. Based on a rolling 12-month calculation.

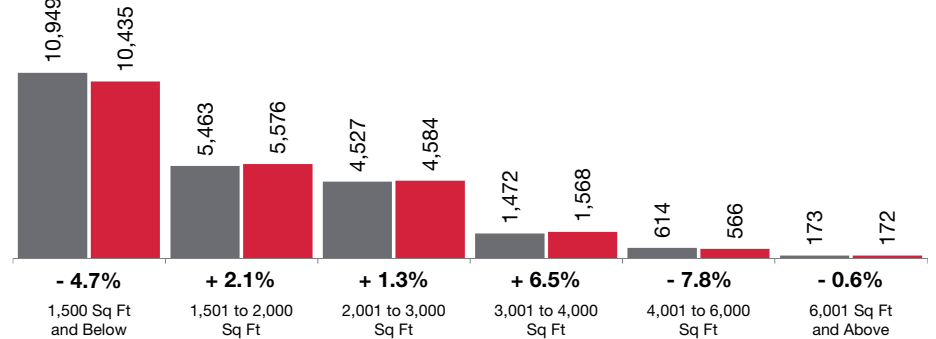
By Price Range

■ 12-2024 ■ 12-2025



By Square Feet

■ 12-2024 ■ 12-2025



All Properties

By Price Range	12-2024	12-2025	Change
\$250,000 and Below	62	63	+ 1.6%
\$250,001 to \$500,000	1,930	1,951	+ 1.1%
\$500,001 to \$750,000	5,613	5,319	- 5.2%
\$750,001 to \$1,000,000	6,488	6,287	- 3.1%
\$1,000,001 to \$1,250,000	2,791	2,880	+ 3.2%
\$1,250,001 to \$2,000,000	3,973	3,985	+ 0.3%
\$2,000,001 to \$5,000,000	2,056	2,117	+ 3.0%
\$5,000,001 and Above	285	299	+ 4.9%
All Price Ranges	23,198	22,901	- 1.3%

Single-Family Homes

12-2024	12-2025	Change	12-2024	12-2025	Change
33	23	- 30.3%	29	40	+ 37.9%
215	196	- 8.8%	1,715	1,755	+ 2.3%
2,203	2,083	- 5.4%	3,410	3,236	- 5.1%
4,791	4,772	- 0.4%	1,697	1,515	- 10.7%
2,276	2,341	+ 2.9%	515	539	+ 4.7%
3,301	3,359	+ 1.8%	672	626	- 6.8%
1,791	1,813	+ 1.2%	265	304	+ 14.7%
277	286	+ 3.2%	8	13	+ 62.5%
14,887	14,873	- 0.1%	8,311	8,028	- 3.4%

Condos - Townhomes

By Square Feet	12-2024	12-2025	Change
1,500 Sq Ft and Below	10,949	10,435	- 4.7%
1,501 to 2,000 Sq Ft	5,463	5,576	+ 2.1%
2,001 to 3,000 Sq Ft	4,527	4,584	+ 1.3%
3,001 to 4,000 Sq Ft	1,472	1,568	+ 6.5%
4,001 to 6,000 Sq Ft	614	566	- 7.8%
6,001 Sq Ft and Above	173	172	- 0.6%
All Square Footage	23,198	22,901	- 1.3%

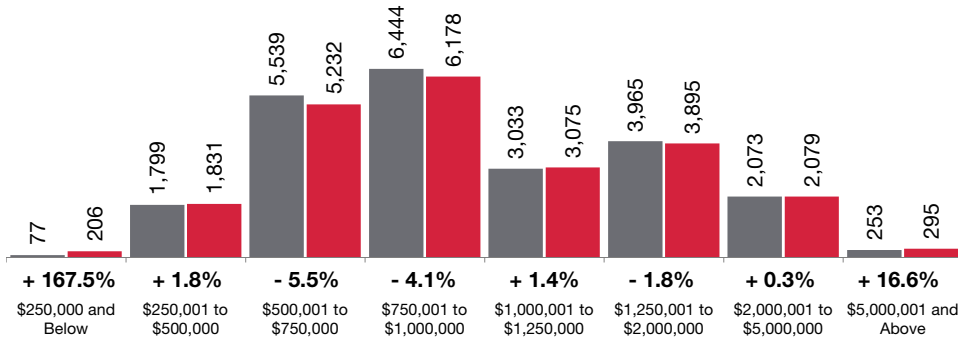
12-2024	12-2025	Change	12-2024	12-2025	Change
4,596	4,354	- 5.3%	6,353	6,081	- 4.3%
3,939	4,077	+ 3.5%	1,524	1,499	- 1.6%
4,149	4,190	+ 1.0%	378	394	+ 4.2%
1,430	1,525	+ 6.6%	42	43	+ 2.4%
601	557	- 7.3%	13	9	- 30.8%
172	170	- 1.2%	1	2	+ 100.0%
14,887	14,873	- 0.1%	8,311	8,028	- 3.4%

Closed Sales

A count of the actual sales that have closed in a given month. Based on a rolling 12-month calculation.

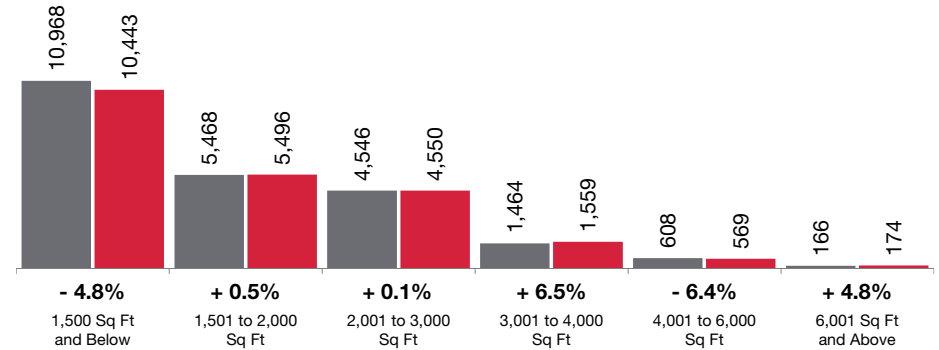
By Price Range

■ 12-2024 ■ 12-2025



By Square Feet

■ 12-2024 ■ 12-2025



All Properties

By Price Range	12-2024	12-2025	Change
\$250,000 and Below	77	206	+ 167.5%
\$250,001 to \$500,000	1,799	1,831	+ 1.8%
\$500,001 to \$750,000	5,539	5,232	- 5.5%
\$750,001 to \$1,000,000	6,444	6,178	- 4.1%
\$1,000,001 to \$1,250,000	3,033	3,075	+ 1.4%
\$1,250,001 to \$2,000,000	3,965	3,895	- 1.8%
\$2,000,001 to \$5,000,000	2,073	2,079	+ 0.3%
\$5,000,001 and Above	253	295	+ 16.6%
All Price Ranges	23,183	22,791	- 1.7%

Single-Family Homes

12-2024	12-2025	Change
39	100	+ 156.4%
200	193	- 3.5%
2,040	1,927	- 5.5%
4,742	4,676	- 1.4%
2,474	2,527	+ 2.1%
3,304	3,278	- 0.8%
1,811	1,790	- 1.2%
247	277	+ 12.1%
14,857	14,768	- 0.6%

Condos - Townhomes

12-2024	12-2025	Change
38	106	+ 178.9%
1,599	1,638	+ 2.4%
3,499	3,305	- 5.5%
1,702	1,502	- 11.8%
559	548	- 2.0%
661	617	- 6.7%
262	289	+ 10.3%
6	18	+ 200.0%
8,326	8,023	- 3.6%

By Square Feet

12-2024	12-2025	Change
10,968	10,443	- 4.8%
5,468	5,496	+ 0.5%
4,546	4,550	+ 0.1%
1,464	1,559	+ 6.5%
608	569	- 6.4%
166	174	+ 4.8%
23,183	22,791	- 1.7%

Single-Family Homes

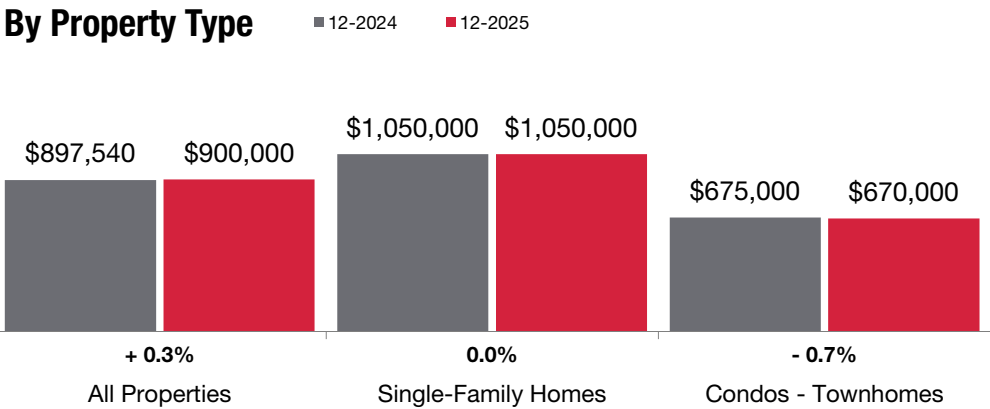
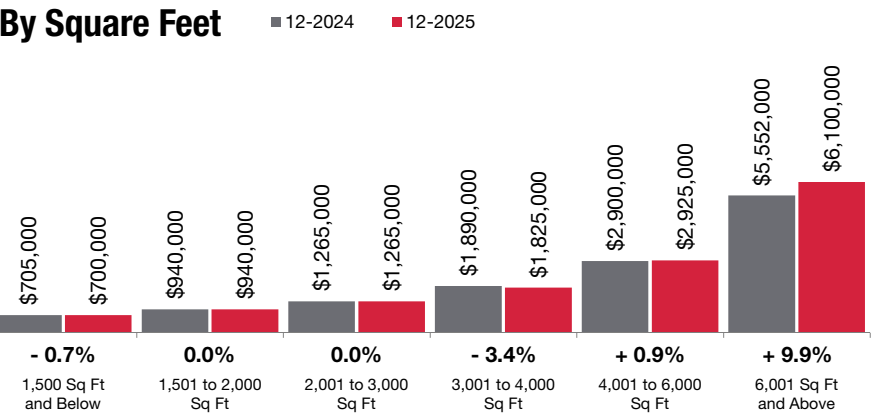
12-2024	12-2025	Change
4,603	4,351	- 5.5%
3,945	4,011	+ 1.7%
4,129	4,154	+ 0.6%
1,419	1,521	+ 7.2%
596	559	- 6.2%
165	172	+ 4.2%
14,857	14,768	- 0.6%

Condos - Townhomes

12-2024	12-2025	Change
6,365	6,092	- 4.3%
1,523	1,485	- 2.5%
380	396	+ 4.2%
45	38	- 15.6%
12	10	- 16.7%
1	2	+ 100.0%
8,326	8,023	- 3.6%

Median Sales Price

Point at which half of the sales sold for more and half sold for less, not accounting for seller concessions, in a given month. **Based on a rolling 12-month median.**



All Properties			
By Square Feet	12-2024	12-2025	Change
1,500 Sq Ft and Below	\$705,000	\$700,000	- 0.7%
1,501 to 2,000 Sq Ft	\$940,000	\$940,000	0.0%
2,001 to 3,000 Sq Ft	\$1,265,000	\$1,265,000	0.0%
3,001 to 4,000 Sq Ft	\$1,890,000	\$1,825,000	- 3.4%
4,001 to 6,000 Sq Ft	\$2,900,000	\$2,925,000	+ 0.9%
6,001 Sq Ft and Above	\$5,552,000	\$6,100,000	+ 9.9%
All Square Footage	\$897,540	\$900,000	+ 0.3%

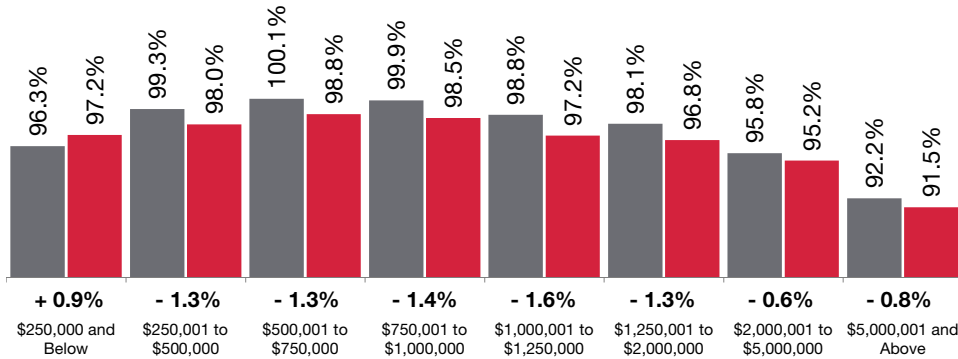
Single-Family Homes			Condos - Townhomes		
12-2024	12-2025	Change	12-2024	12-2025	Change
\$799,000	\$800,000	+ 0.1%	\$610,000	\$600,000	- 1.6%
\$950,000	\$950,000	0.0%	\$899,990	\$905,000	+ 0.6%
\$1,250,000	\$1,250,000	0.0%	\$1,497,500	\$1,550,000	+ 3.5%
\$1,877,500	\$1,814,741	- 3.3%	\$2,360,000	\$2,225,000	- 5.7%
\$2,890,000	\$2,918,084	+ 1.0%	\$3,930,000	\$3,424,500	- 12.9%
\$5,554,000	\$6,100,000	+ 9.8%	\$2,250,000	\$3,690,550	+ 64.0%
\$1,050,000	\$1,050,000	0.0%	\$675,000	\$670,000	- 0.7%

Percent of Original List Price Received

Percentage found when dividing a property's sales price by its original list price, then taking the average for all properties sold, in a given month, not accounting for seller concessions. **Based on a rolling 12-month average.**

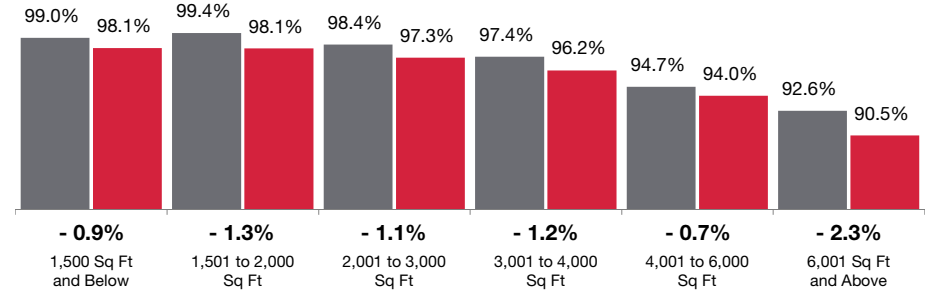
By Price Range

■ 12-2024 ■ 12-2025



By Square Feet

■ 12-2024 ■ 12-2025



All Properties

By Price Range	12-2024	12-2025	Change
\$250,000 and Below	96.3%	97.2%	+ 0.9%
\$250,001 to \$500,000	99.3%	98.0%	- 1.3%
\$500,001 to \$750,000	100.1%	98.8%	- 1.3%
\$750,001 to \$1,000,000	99.9%	98.5%	- 1.4%
\$1,000,001 to \$1,250,000	98.8%	97.2%	- 1.6%
\$1,250,001 to \$2,000,000	98.1%	96.8%	- 1.3%
\$2,000,001 to \$5,000,000	95.8%	95.2%	- 0.6%
\$5,000,001 and Above	92.2%	91.5%	- 0.8%
All Price Ranges	99.0%	97.7%	- 1.3%

Single-Family Homes

12-2024	12-2025	Change	12-2024	12-2025	Change
94.1%	93.9%	- 0.2%	99.0%	99.5%	+ 0.5%
100.8%	98.6%	- 2.2%	99.0%	98.0%	- 1.0%
101.1%	100.2%	- 0.9%	99.4%	98.0%	- 1.4%
100.3%	98.9%	- 1.4%	98.9%	97.5%	- 1.4%
99.0%	97.4%	- 1.6%	97.8%	96.3%	- 1.5%
98.3%	96.9%	- 1.4%	96.9%	96.1%	- 0.8%
96.0%	95.3%	- 0.7%	94.5%	94.7%	+ 0.2%
92.4%	91.4%	- 1.1%	87.6%	95.1%	+ 8.6%
99.1%	97.7%	- 1.4%	98.8%	97.5%	- 1.3%

Condos - Townhomes

By Square Feet	12-2024	12-2025	Change
1,500 Sq Ft and Below	99.0%	98.1%	- 0.9%
1,501 to 2,000 Sq Ft	99.4%	98.1%	- 1.3%
2,001 to 3,000 Sq Ft	98.4%	97.3%	- 1.1%
3,001 to 4,000 Sq Ft	97.4%	96.2%	- 1.2%
4,001 to 6,000 Sq Ft	94.7%	94.0%	- 0.7%
6,001 Sq Ft and Above	92.6%	90.5%	- 2.3%
All Square Footage	99.0%	97.7%	- 1.3%

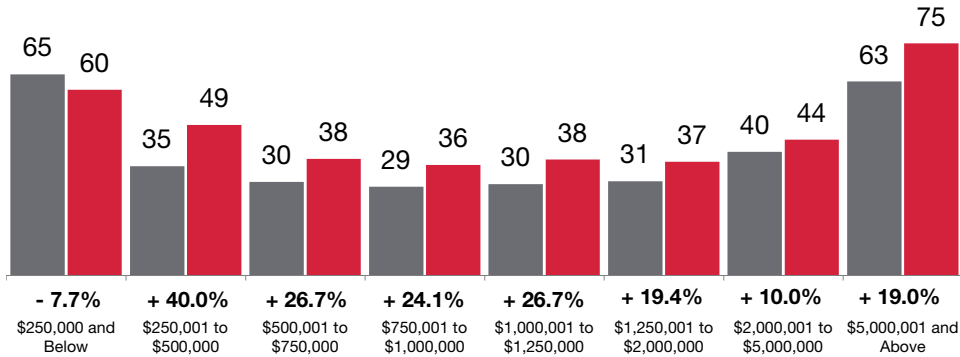
12-2024	12-2025	Change	12-2024	12-2025	Change
100.3%	98.8%	- 1.5%	98.9%	97.6%	- 1.3%
99.7%	98.4%	- 1.3%	98.7%	97.3%	- 1.4%
98.5%	97.3%	- 1.2%	97.3%	96.9%	- 0.4%
97.5%	96.2%	- 1.3%	92.4%	93.6%	+ 1.3%
94.8%	94.0%	- 0.8%	91.3%	90.7%	- 0.7%
92.7%	90.4%	- 2.5%	77.6%	93.4%	+ 20.4%
99.1%	97.7%	- 1.4%	98.8%	97.5%	- 1.3%

Days on Market Until Sale

Average number of days between when a property is listed and when an offer is accepted, in a given month.
Based on a rolling 12-month average.

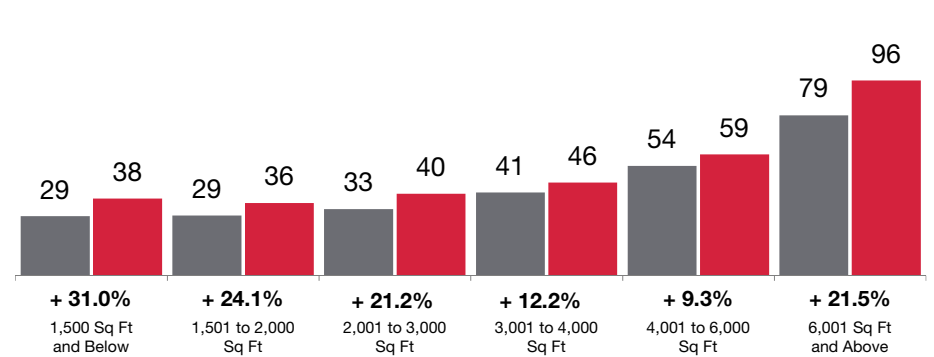
By Price Range

■ 12-2024 ■ 12-2025



By Square Feet

■ 12-2024 ■ 12-2025



All Properties

By Price Range	12-2024	12-2025	Change
\$250,000 and Below	65	60	- 7.7%
\$250,001 to \$500,000	35	49	+ 40.0%
\$500,001 to \$750,000	30	38	+ 26.7%
\$750,001 to \$1,000,000	29	36	+ 24.1%
\$1,000,001 to \$1,250,000	30	38	+ 26.7%
\$1,250,001 to \$2,000,000	31	37	+ 19.4%
\$2,000,001 to \$5,000,000	40	44	+ 10.0%
\$5,000,001 and Above	63	75	+ 19.0%
All Price Ranges	32	39	+ 21.9%

Single-Family Homes

12-2024	12-2025	Change	12-2024	12-2025	Change
69	55	- 20.3%	62	65	+ 4.8%
41	58	+ 41.5%	35	48	+ 37.1%
30	35	+ 16.7%	31	39	+ 25.8%
28	35	+ 25.0%	31	40	+ 29.0%
29	37	+ 27.6%	33	40	+ 21.2%
30	36	+ 20.0%	33	41	+ 24.2%
39	43	+ 10.3%	50	51	+ 2.0%
63	76	+ 20.6%	58	57	- 1.7%
31	38	+ 22.6%	33	42	+ 27.3%

Condos - Townhomes

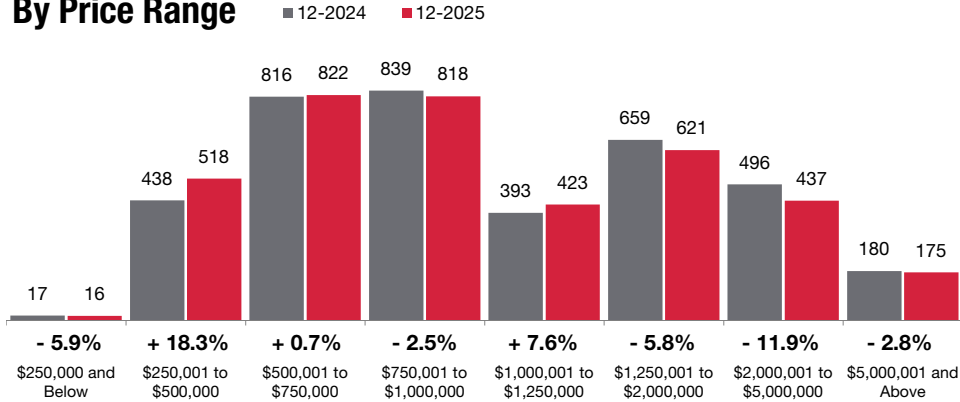
By Square Feet	12-2024	12-2025	Change
1,500 Sq Ft and Below	29	38	+ 31.0%
1,501 to 2,000 Sq Ft	29	36	+ 24.1%
2,001 to 3,000 Sq Ft	33	40	+ 21.2%
3,001 to 4,000 Sq Ft	41	46	+ 12.2%
4,001 to 6,000 Sq Ft	54	59	+ 9.3%
6,001 Sq Ft and Above	79	96	+ 21.5%
All Square Footage	32	39	+ 21.9%

12-2024	12-2025	Change	12-2024	12-2025	Change
26	32	+ 23.1%	31	42	+ 35.5%
27	33	+ 22.2%	35	43	+ 22.9%
32	39	+ 21.9%	39	46	+ 17.9%
40	46	+ 15.0%	58	48	- 17.2%
53	59	+ 11.3%	82	60	- 26.8%
78	96	+ 23.1%	142	91	- 35.9%
31	38	+ 22.6%	33	42	+ 27.3%

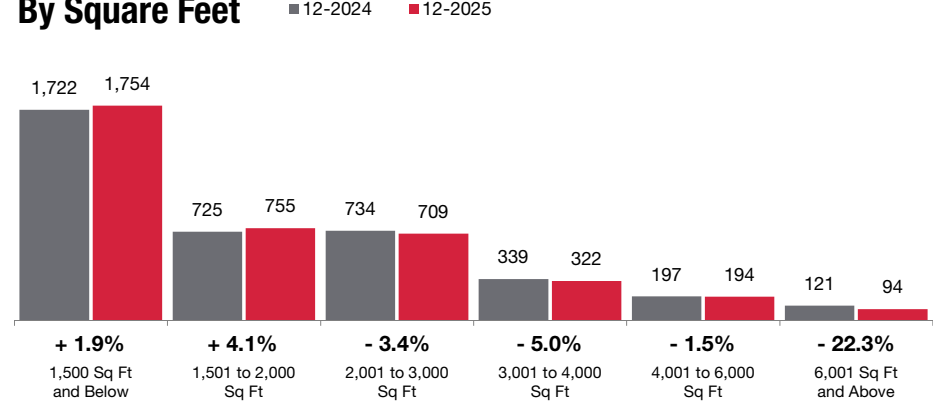
Inventory of Homes for Sale

The number of properties available for sale in active status at the end of a given month.
Based on one month of activity.

By Price Range



By Square Feet



All Properties

By Price Range	12-2024	12-2025	Change
\$250,000 and Below	17	16	- 5.9%
\$250,001 to \$500,000	438	518	+ 18.3%
\$500,001 to \$750,000	816	822	+ 0.7%
\$750,001 to \$1,000,000	839	818	- 2.5%
\$1,000,001 to \$1,250,000	393	423	+ 7.6%
\$1,250,001 to \$2,000,000	659	621	- 5.8%
\$2,000,001 to \$5,000,000	496	437	- 11.9%
\$5,000,001 and Above	180	175	- 2.8%
All Price Ranges	3,838	3,830	- 0.2%

Single-Family Homes

12-2024	12-2025	Change
5	4	- 20.0%
60	54	- 10.0%
242	205	- 15.3%
571	522	- 8.6%
304	331	+ 8.9%
532	494	- 7.1%
404	358	- 11.4%
177	164	- 7.3%
2,295	2,132	- 7.1%

Condos - Townhomes

12-2024	12-2025	Change
12	12	0.0%
378	464	+ 22.8%
574	617	+ 7.5%
268	296	+ 10.4%
89	92	+ 3.4%
127	127	0.0%
92	79	- 14.1%
3	11	+ 266.7%
1,543	1,698	+ 10.0%

By Square Feet

By Square Feet	12-2024	12-2025	Change
1,500 Sq Ft and Below	1,722	1,754	+ 1.9%
1,501 to 2,000 Sq Ft	725	755	+ 4.1%
2,001 to 3,000 Sq Ft	734	709	- 3.4%
3,001 to 4,000 Sq Ft	339	322	- 5.0%
4,001 to 6,000 Sq Ft	197	194	- 1.5%
6,001 Sq Ft and Above	121	94	- 22.3%
All Square Footage	3,838	3,830	- 0.2%

12-2024	12-2025	Change
537	486	- 9.5%
469	438	- 6.6%
647	621	- 4.0%
330	309	- 6.4%
192	183	- 4.7%
120	93	- 22.5%
2,295	2,132	- 7.1%

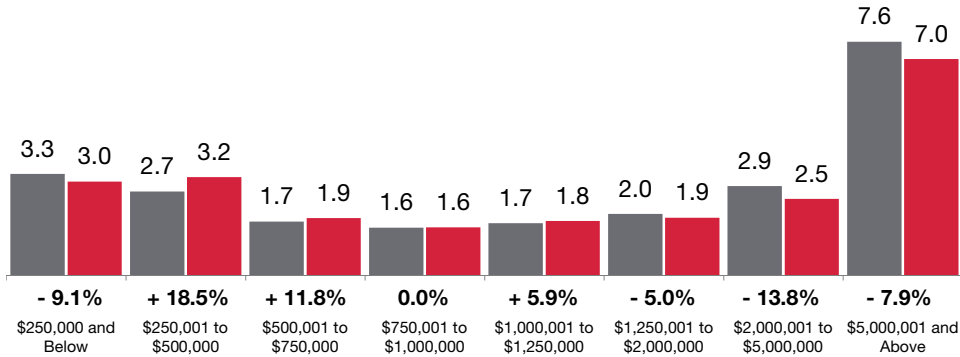
12-2024	12-2025	Change
1,185	1,268	+ 7.0%
256	317	+ 23.8%
87	88	+ 1.1%
9	13	+ 44.4%
5	11	+ 120.0%
1	1	0.0%
1,543	1,698	+ 10.0%

Months Supply of Inventory

The inventory of homes for sale at the end of the most recent month, **based on one month of activity**, divided by the average monthly pending sales from the last 12 months.

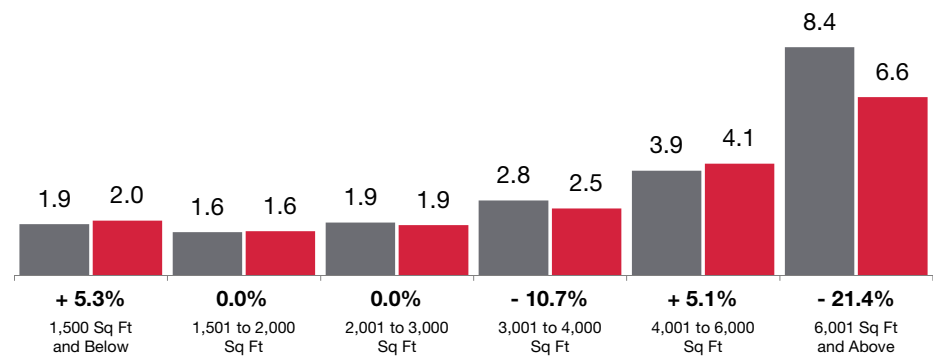
By Price Range

■ 12-2024 ■ 12-2025



By Square Feet

■ 12-2024 ■ 12-2025



All Properties

By Price Range	12-2024	12-2025	Change
\$250,000 and Below	3.3	3.0	- 9.1%
\$250,001 to \$500,000	2.7	3.2	+ 18.5%
\$500,001 to \$750,000	1.7	1.9	+ 11.8%
\$750,001 to \$1,000,000	1.6	1.6	0.0%
\$1,000,001 to \$1,250,000	1.7	1.8	+ 5.9%
\$1,250,001 to \$2,000,000	2.0	1.9	- 5.0%
\$2,000,001 to \$5,000,000	2.9	2.5	- 13.8%
\$5,000,001 and Above	7.6	7.0	- 7.9%
All Price Ranges	2.0	2.0	0.0%

Single-Family Homes

12-2024	12-2025	Change	12-2024	12-2025	Change
1.8	1.7	- 5.6%	4.6	3.6	- 21.7%
3.3	3.3	0.0%	2.6	3.2	+ 23.1%
1.3	1.2	- 7.7%	2.0	2.3	+ 15.0%
1.4	1.3	- 7.1%	1.9	2.3	+ 21.1%
1.6	1.7	+ 6.3%	2.1	2.0	- 4.8%
1.9	1.8	- 5.3%	2.3	2.4	+ 4.3%
2.7	2.4	- 11.1%	4.2	3.1	- 26.2%
7.7	6.9	- 10.4%	1.9	7.6	+ 300.0%
1.8	1.7	- 5.6%	2.2	2.5	+ 13.6%

Condos - Townhomes

By Square Feet	12-2024	12-2025	Change
1,500 Sq Ft and Below	1.9	2.0	+ 5.3%
1,501 to 2,000 Sq Ft	1.6	1.6	0.0%
2,001 to 3,000 Sq Ft	1.9	1.9	0.0%
3,001 to 4,000 Sq Ft	2.8	2.5	- 10.7%
4,001 to 6,000 Sq Ft	3.9	4.1	+ 5.1%
6,001 Sq Ft and Above	8.4	6.6	- 21.4%
All Square Footage	2.0	2.0	0.0%

12-2024	12-2025	Change	12-2024	12-2025	Change
1.4	1.3	- 7.1%	2.2	2.5	+ 13.6%
1.4	1.3	- 7.1%	2.0	2.5	+ 25.0%
1.9	1.8	- 5.3%	2.8	2.7	- 3.6%
2.8	2.4	- 14.3%	2.4	3.0	+ 25.0%
3.8	3.9	+ 2.6%	3.1	8.6	+ 177.4%
8.4	6.6	- 21.4%	1.0	1.0	0.0%
1.8	1.7	- 5.6%	2.2	2.5	+ 13.6%