Housing Supply Overview

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

October 2025

Although mortgage rates have edged down, U.S. pending home sales were unchanged from the previous month, with contract activity remaining 0.9% lower than a year ago, according to the National Association of REALTORS®. Contract signings increased both month-over-month and year-over-year in the Northeast and South, while the Midwest and West posted declines. For the 12-month period spanning November 2024 through October 2025, Pending Sales in the San Diego were up 0.6 percent overall. The price range with the largest gain in sales was the \$250,000 and Below range, where they increased 10.0 percent.

The overall Median Sales Price was up 1.1 percent to \$900,000. The property type with the largest price gain was the Single-Family Homes segment, where prices increased 1.0 percent to \$1,050,000. The price range that tended to sell the quickest was the \$1,250,001 to \$2,000,000 range at 36 days; the price range that tended to sell the slowest was the \$5,000,001 and Above range at 72 days.

Market-wide, inventory levels were up 3.0 percent. However, the property type with the largest gain was the Condos - Townhomes segment, where they increased 10.0 percent. That amounts to 2.5 months supply for Single-Family homes and 3.3 months supply for Condos.

Quick Facts

+ 10.0% + 9.1%

Price Range With Home Size With Strongest Property Type With Strongest Pending Sales: Pending Sales: Strongest Pending Sales: Strongest Pending Sales: Single-Family Homes

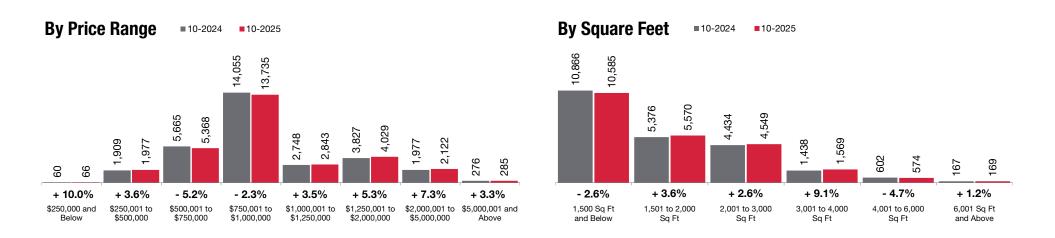
+ 1.6%

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

Pending Sales	2
Closed Sales	3
Median Sales Price	4
Percent of Original List Price Received	5
Days on Market Until Sale	6
Inventory of Homes for Sale	7
Months Supply of Inventory	8

Pending Sales

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



		All Floperile	3
By Price Range	10-2024	10-2025	Change
\$250,000 and Below	60	66	+ 10.0%
\$250,001 to \$500,000	1,909	1,977	+ 3.6%
\$500,001 to \$750,000	5,665	5,368	- 5.2%
\$750,001 to \$1,000,000	14,055	13,735	- 2.3%
\$1,000,001 to \$1,250,000	2,748	2,843	+ 3.5%
\$1,250,001 to \$2,000,000	3,827	4,029	+ 5.3%
\$2,000,001 to \$5,000,000	1,977	2,122	+ 7.3%
\$5,000,001 and Above	276	285	+ 3.3%
All Price Ranges	22,883	23.016	+ 0.6%

All Properties

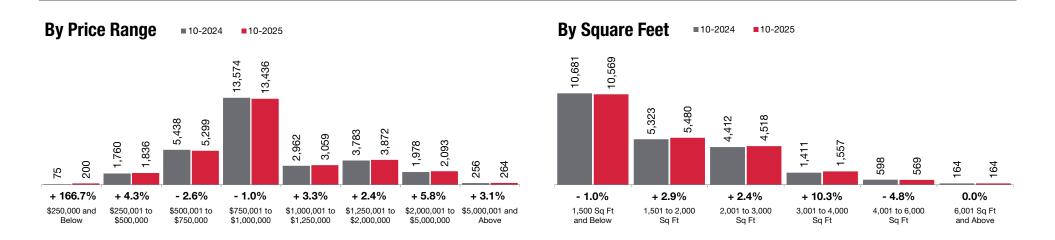
By Square Feet	10-2024	10-2025	Change
1,500 Sq Ft and Below	10,866	10,585	- 2.6%
1,501 to 2,000 Sq Ft	5,376	5,570	+ 3.6%
2,001 to 3,000 Sq Ft	4,434	4,549	+ 2.6%
3,001 to 4,000 Sq Ft	1,438	1,569	+ 9.1%
4,001 to 6,000 Sq Ft	602	574	- 4.7%
6,001 Sq Ft and Above	167	169	+ 1.2%
All Square Footage	22,883	23,016	+ 0.6%

Single-Family Homes			Condos - Townhomes		
10-2024	10-2025	Change	10-2024	10-2025	Change
34	25	- 26.5%	26	41	+ 57.7%
213	204	- 4.2%	1,696	1,773	+ 4.5%
2,256	2,094	- 7.2%	3,409	3,274	- 4.0%
7,247	7,099	- 2.0%	6,808	6,636	- 2.5%
2,234	2,307	+ 3.3%	514	536	+ 4.3%
3,189	3,386	+ 6.2%	638	643	+ 0.8%
1,716	1,828	+ 6.5%	261	294	+ 12.6%
267	273	+ 2.2%	9	12	+ 33.3%
14,653	14,894	+ 1.6%	8,230	8,122	- 1.3%

10-2024	10-2025	Change	10-2024	10-2025	Change
4,552	4,401	- 3.3%	6,314	6,184	- 2.1%
3,902	4,058	+ 4.0%	1,474	1,512	+ 2.6%
4,053	4,164	+ 2.7%	381	385	+ 1.0%
1,391	1,538	+ 10.6%	47	31	- 34.0%
589	566	- 3.9%	13	8	- 38.5%
166	167	+ 0.6%	1	2	+ 100.0%
14,653	14,894	+ 1.6%	8,230	8,122	- 1.3%

Closed Sales

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



	4	All Fropertie	3
By Price Range	10-2024	10-2025	Change
\$250,000 and Below	75	200	+ 166.7%
\$250,001 to \$500,000	1,760	1,836	+ 4.3%
\$500,001 to \$750,000	5,438	5,299	- 2.6%
\$750,001 to \$1,000,000	13,574	13,436	- 1.0%
\$1,000,001 to \$1,250,000	2,962	3,059	+ 3.3%
\$1,250,001 to \$2,000,000	3,783	3,872	+ 2.4%
\$2,000,001 to \$5,000,000	1,978	2,093	+ 5.8%
\$5,000,001 and Above	256	264	+ 3.1%
All Price Ranges	22,554	22,857	+ 1.3%

All Properties

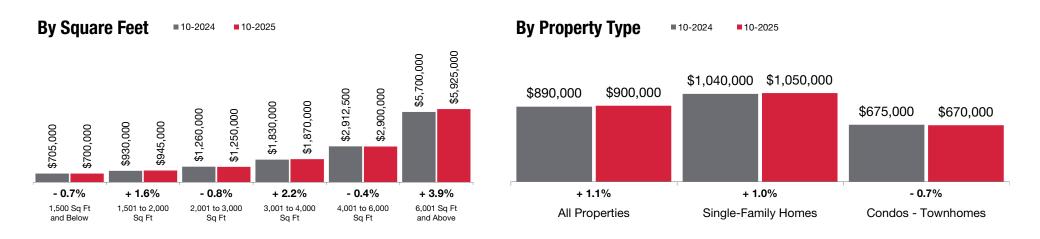
By Square Feet	10-2024	10-2025	Change
1,500 Sq Ft and Below	10,681	10,569	- 1.0%
1,501 to 2,000 Sq Ft	5,323	5,480	+ 2.9%
2,001 to 3,000 Sq Ft	4,412	4,518	+ 2.4%
3,001 to 4,000 Sq Ft	1,411	1,557	+ 10.3%
4,001 to 6,000 Sq Ft	598	569	- 4.8%
6,001 Sq Ft and Above	164	164	0.0%
All Square Footage	22,554	22,857	+ 1.3%

Single-Family Homes			Condos - Townhomes		
10-2024	10-2025	Change	10-2024	10-2025	Change
40	101	+ 152.5%	35	99	+ 182.9%
195	196	+ 0.5%	1,565	1,640	+ 4.8%
2,049	1,959	- 4.4%	3,389	3,340	- 1.4%
6,884	6,900	+ 0.2%	6,690	6,536	- 2.3%
2,410	2,512	+ 4.2%	552	547	- 0.9%
3,156	3,264	+ 3.4%	627	608	- 3.0%
1,730	1,808	+ 4.5%	248	285	+ 14.9%
249	249	0.0%	7	15	+ 114.3%
14,430	14,805	+ 2.6%	8,124	8,052	- 0.9%

10-2024	10-2025	Change	10-2024	10-2025	Change
4,460	4,421	- 0.9%	6,221	6,148	- 1.2%
3,863	4,004	+ 3.7%	1,460	1,476	+ 1.1%
3,991	4,135	+ 3.6%	386	383	- 0.8%
1,367	1,522	+ 11.3%	44	35	- 20.5%
586	561	- 4.3%	12	8	- 33.3%
163	162	- 0.6%	1	2	+ 100.0%
14,430	14.805	+ 2.6%	8.124	8.052	- 0.9%

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.**



Single-Family Homes

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By Square Feet	10-2024	10-2025	Change
1,500 Sq Ft and Below	\$705,000	\$700,000	- 0.7%
1,501 to 2,000 Sq Ft	\$930,000	\$945,000	+ 1.6%
2,001 to 3,000 Sq Ft	\$1,260,000	\$1,250,000	- 0.8%
3,001 to 4,000 Sq Ft	\$1,830,000	\$1,870,000	+ 2.2%
4,001 to 6,000 Sq Ft	\$2,912,500	\$2,900,000	- 0.4%
6,001 Sq Ft and Above	\$5,700,000	\$5,925,000	+ 3.9%
All Square Footage	\$890,000	\$900,000	+ 1.1%

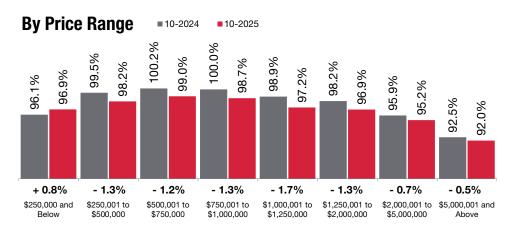
All Properties

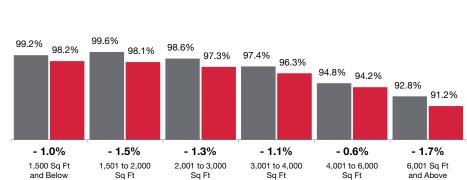
Onigie-i anniy Homes			Odilada - Townindinea			
10-2024	10-2025	Change	10-2024	10-2025	Change	
\$795,000	\$800,000	+ 0.6%	\$610,000	\$602,000	- 1.3%	
\$945,000	\$955,000	+ 1.1%	\$895,000	\$900,000	+ 0.6%	
\$1,250,000	\$1,240,000	- 0.8%	\$1,477,500	\$1,487,500	+ 0.7%	
\$1,816,500	\$1,860,000	+ 2.4%	\$2,342,500	\$2,530,000	+ 8.0%	
\$2,900,000	\$2,900,000	0.0%	\$3,930,000	\$2,749,500	- 30.0%	
\$5,700,000	\$5,925,000	+ 3.9%	\$2,250,000	\$3,690,550	+ 64.0%	
\$1,040,000	\$1,050,000	+ 1.0%	\$675,000	\$670,000	- 0.7%	

Condos - Townhomes

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.





Condos - Townhomes

10-2025

■10-2024

	All Properties
40.0004	40.0005

By Price Range	10-2024	10-2025	Change
\$250,000 and Below	96.1%	96.9%	+ 0.8%
\$250,001 to \$500,000	99.5%	98.2%	- 1.3%
\$500,001 to \$750,000	100.2%	99.0%	- 1.2%
\$750,001 to \$1,000,000	100.0%	98.7%	- 1.3%
\$1,000,001 to \$1,250,000	98.9%	97.2%	- 1.7%
\$1,250,001 to \$2,000,000	98.2%	96.9%	- 1.3%
\$2,000,001 to \$5,000,000	95.9%	95.2%	- 0.7%
\$5,000,001 and Above	92.5%	92.0%	- 0.5%
All Price Ranges	99.1%	97.7%	- 1.4%

By Square Feet	10-2024	10-2025	Change
1,500 Sq Ft and Below	99.2%	98.2%	- 1.0%
1,501 to 2,000 Sq Ft	99.6%	98.1%	- 1.5%
2,001 to 3,000 Sq Ft	98.6%	97.3%	- 1.3%
3,001 to 4,000 Sq Ft	97.4%	96.3%	- 1.1%
4,001 to 6,000 Sq Ft	94.8%	94.2%	- 0.6%
6,001 Sq Ft and Above	92.8%	91.2%	- 1.7%
All Square Footage	99.1%	97.7%	- 1.4%

Single-Family Homes

By Square Feet

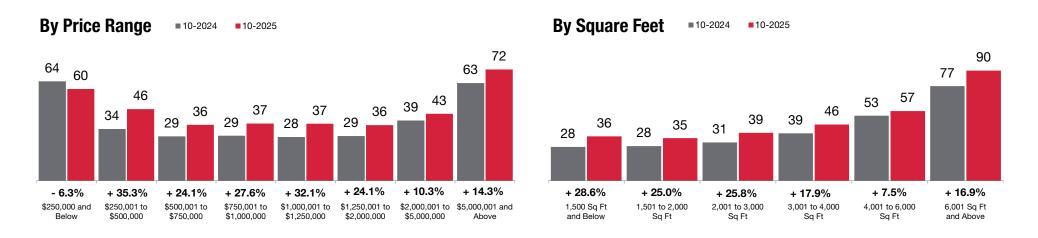
10-2024	10-2025	Change	10-2024	10-2025	Change
93.8%	94.5%	+ 0.7%	99.0%	99.0%	0.0%
100.4%	99.1%	- 1.3%	99.4%	98.0%	- 1.4%
101.1%	100.2%	- 0.9%	99.6%	98.2%	- 1.4%
100.6%	99.3%	- 1.3%	99.4%	98.0%	- 1.4%
99.1%	97.4%	- 1.7%	98.0%	96.5%	- 1.5%
98.5%	97.0%	- 1.5%	96.9%	96.3%	- 0.6%
96.2%	95.3%	- 0.9%	94.5%	94.6%	+ 0.1%
92.6%	91.8%	- 0.9%	89.0%	95.2%	+ 7.0%
99.2%	97.8%	- 1.4%	99.0%	97.6%	- 1.4%

10-2024	10-2025	Change	10-2024	10-2025	Change
100.4%	98.9%	- 1.5%	99.2%	97.7%	- 1.5%
100.0%	98.3%	- 1.7%	98.7%	97.4%	- 1.3%
98.7%	97.3%	- 1.4%	97.4%	97.1%	- 0.3%
97.6%	96.4%	- 1.2%	92.6%	95.2%	+ 2.8%
94.9%	94.2%	- 0.7%	91.3%	90.7%	- 0.7%
92.9%	91.2%	- 1.8%	77.6%	93.4%	+ 20.4%
99.2%	97.8%	- 1.4%	99.0%	97.6%	- 1.4%

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.

All Properties



	4	All Floperties				
By Price Range	10-2024	10-2025	Change			
\$250,000 and Below	64	60	- 6.3%			
\$250,001 to \$500,000	34	46	+ 35.3%			
\$500,001 to \$750,000	29	36	+ 24.1%			
\$750,001 to \$1,000,000	29	37	+ 27.6%			
\$1,000,001 to \$1,250,000	28	37	+ 32.1%			
\$1,250,001 to \$2,000,000	29	36	+ 24.1%			
\$2,000,001 to \$5,000,000	39	43	+ 10.3%			
\$5,000,001 and Above	63	72	+ 14.3%			
All Price Ranges	30	38	+ 26.7%			

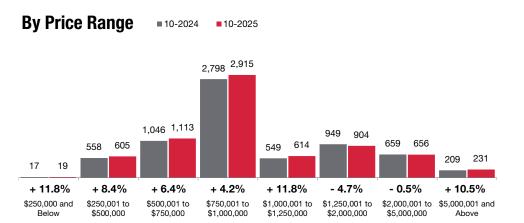
By Square Feet	10-2024	10-2025	Change
1,500 Sq Ft and Below	28	36	+ 28.6%
1,501 to 2,000 Sq Ft	28	35	+ 25.0%
2,001 to 3,000 Sq Ft	31	39	+ 25.8%
3,001 to 4,000 Sq Ft	39	46	+ 17.9%
4,001 to 6,000 Sq Ft	53	57	+ 7.5%
6,001 Sq Ft and Above	77	90	+ 16.9%
All Square Footage	30	38	+ 26.7%

Single-Family Homes			Condos - Townhomes		
10-2024	10-2025	Change	10-2024	10-2025	Change
69	53	- 23.2%	59	66	+ 11.9%
39	57	+ 46.2%	33	45	+ 36.4%
28	34	+ 21.4%	29	38	+ 31.0%
28	34	+ 21.4%	30	40	+ 33.3%
27	37	+ 37.0%	32	39	+ 21.9%
28	35	+ 25.0%	32	39	+ 21.9%
38	42	+ 10.5%	47	50	+ 6.4%
64	73	+ 14.1%	50	56	+ 12.0%
30	37	+ 23.3%	31	40	+ 29.0%

10-2024	10-2025	Change	10-2024	10-2025	Change
25	31	+ 24.0%	30	40	+ 33.3%
26	32	+ 23.1%	34	42	+ 23.5%
30	39	+ 30.0%	40	43	+ 7.5%
38	46	+ 21.1%	56	54	- 3.6%
53	57	+ 7.5%	82	62	- 24.4%
77	90	+ 16.9%	142	91	- 35.9%
30	37	+ 23.3%	31	40	+ 29.0%

Inventory of Homes for Sale

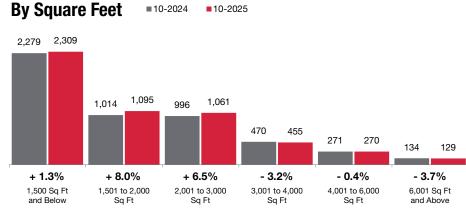
The number of properties available for sale in active status at the end of a given month. Based on one month of activity.



All Properties

5,321

+ 3.0%



By Price Range	10-2024	10-2025	Change
\$250,000 and Below	17	19	+ 11.8%
\$250,001 to \$500,000	558	605	+ 8.4%
\$500,001 to \$750,000	1,046	1,113	+ 6.4%
\$750,001 to \$1,000,000	2,798	2,915	+ 4.2%
\$1,000,001 to \$1,250,000	549	614	+ 11.8%
\$1,250,001 to \$2,000,000	949	904	- 4.7%
\$2,000,001 to \$5,000,000	659	656	- 0.5%
\$5,000,001 and Above	209	231	+ 10.5%

By Square Feet	10-2024	10-2025	Change
1,500 Sq Ft and Below	2,279	2,309	+ 1.3%
1,501 to 2,000 Sq Ft	1,014	1,095	+ 8.0%
2,001 to 3,000 Sq Ft	996	1,061	+ 6.5%
3,001 to 4,000 Sq Ft	470	455	- 3.2%
4,001 to 6,000 Sq Ft	271	270	- 0.4%
6,001 Sq Ft and Above	134	129	- 3.7%
All Square Footage	5,164	5,321	+ 3.0%

5,164

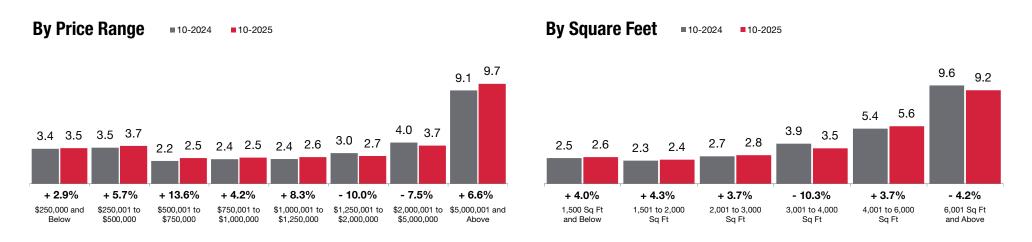
Single-Family Homes			Condos - Townhomes		
10-2024	10-2025	Change	10-2024	10-2025	Change
6	4	- 33.3%	11	15	+ 36.4%
67	59	- 11.9%	491	546	+ 11.2%
329	281	- 14.6%	717	832	+ 16.0%
1,209	1,136	- 6.0%	1,589	1,779	+ 12.0%
425	474	+ 11.5%	124	140	+ 12.9%
760	707	- 7.0%	189	197	+ 4.2%
535	546	+ 2.1%	124	110	- 11.3%
201	220	+ 9.5%	8	11	+ 37.5%
3,130	3,083	- 1.5%	2,034	2,238	+ 10.0%

10-2024	10-2025	Change	10-2024	10-2025	Change	
750	661	- 11.9%	1,529	1,648	+ 7.8%	
652	664	+ 1.8%	362	431	+ 19.1%	
876	935	+ 6.7%	120	126	+ 5.0%	
455	433	- 4.8%	15	22	+ 46.7%	
264	260	- 1.5%	7	10	+ 42.9%	
133	128	- 3.8%	1	1	0.0%	
3,130	3,083	- 1.5%	2,034	2,238	+ 10.0%	

All Price Ranges

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.



	All Properties		
By Price Range	10-2024	10-2025	Change
\$250,000 and Below	3.4	3.5	+ 2.9%
\$250,001 to \$500,000	3.5	3.7	+ 5.7%
\$500,001 to \$750,000	2.2	2.5	+ 13.6%
\$750,001 to \$1,000,000	2.4	2.5	+ 4.2%
\$1,000,001 to \$1,250,000	2.4	2.6	+ 8.3%
\$1,250,001 to \$2,000,000	3.0	2.7	- 10.0%
\$2,000,001 to \$5,000,000	4.0	3.7	- 7.5%
\$5,000,001 and Above	9.1	9.7	+ 6.6%
All Price Ranges	2.7	2.8	+ 3.7%

By Square Feet	10-2024	10-2025	Change	
1,500 Sq Ft and Below	2.5	2.6	+ 4.0%	
1,501 to 2,000 Sq Ft	2.3	2.4	+ 4.3%	
2,001 to 3,000 Sq Ft	2.7	2.8	+ 3.7%	
3,001 to 4,000 Sq Ft	3.9	3.5	- 10.3%	
4,001 to 6,000 Sq Ft	5.4	5.6	+ 3.7%	
6,001 Sq Ft and Above	9.6	9.2	- 4.2%	
All Square Footage	2.7	2.8	+ 3.7%	

Single-Family Homes			Condos - Townhomes		
10-2024	10-2025	Change	10-2024	10-2025	Change
2.1	1.8	- 14.3%	4.7	4.4	- 6.4%
3.8	3.5	- 7.9%	3.5	3.7	+ 5.7%
1.8	1.6	- 11.1%	2.5	3.0	+ 20.0%
2.0	1.9	- 5.0%	2.8	3.2	+ 14.3%
2.3	2.5	+ 8.7%	2.9	3.1	+ 6.9%
2.9	2.5	- 13.8%	3.6	3.7	+ 2.8%
3.7	3.6	- 2.7%	5.7	4.5	- 21.1%
9.0	9.7	+ 7.8%	5.3	7.3	+ 37.7%
2.6	2.5	- 3.8%	3.0	3.3	+ 10.0%

10-2024	10-2025	Change	10-2024	10-2025	Change
2.0	1.8	- 10.0%	2.9	3.2	+ 10.3%
2.0	2.0	0.0%	2.9	3.4	+ 17.2%
2.6	2.7	+ 3.8%	3.8	3.9	+ 2.6%
3.9	3.4	- 12.8%	3.8	6.4	+ 68.4%
5.4	5.5	+ 1.9%	4.3	8.8	+ 104.7%
9.6	9.2	- 4.2%	1.0	1.0	0.0%
2.6	2.5	- 3.8%	3.0	3.3	+ 10.0%