

# Housing Supply Overview

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

## July 2025

U.S. new-home sales increased 0.6% month-over-month to a seasonally adjusted annual rate of 627,000 units, according to the U.S. Census Bureau. Despite the monthly gain, sales were down 6.6% from the same period last year. The median sales price for new homes fell 4.9% from the previous month to \$401,800 and was 2.9% lower than a year earlier. There were 511,000 new homes available for sale heading into July, equivalent to a 9.8-month supply at the current sales pace. For the 12-month period spanning August 2024 through July 2025, Pending Sales in the San Diego were up 3.0 percent overall. The price range with the largest gain in sales was the \$250,000 and Below range, where they increased 42.0 percent.

The overall Median Sales Price was up 1.7 percent to \$900,000. The property type with the largest price gain was the Single-Family Homes segment, where prices increased 2.4 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 34 days; the price range that tended to sell the slowest was the \$5,000,001 and Above range at 62 days.

Market-wide, inventory levels were up 28.7 percent. The property type with the largest gain was the Condos - Townhomes segment, where they increased 38.1 percent. That amounts to 3.1 months supply for Single-Family homes and 4.0 months supply for Condos.

## Quick Facts

+ 42.0%	+ 9.3%	+ 5.1%
Price Range With Strongest Pending Sales:	Home Size With Strongest Pending Sales:	Property Type With Strongest Pending Sales:
\$250,000 and Below	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.

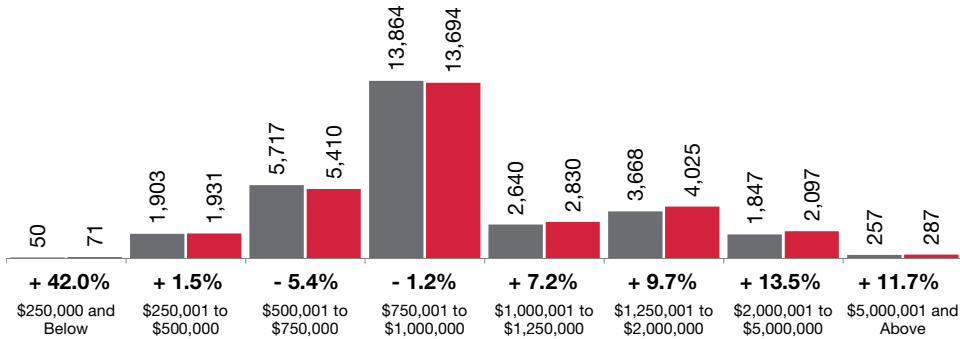
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# Pending Sales

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

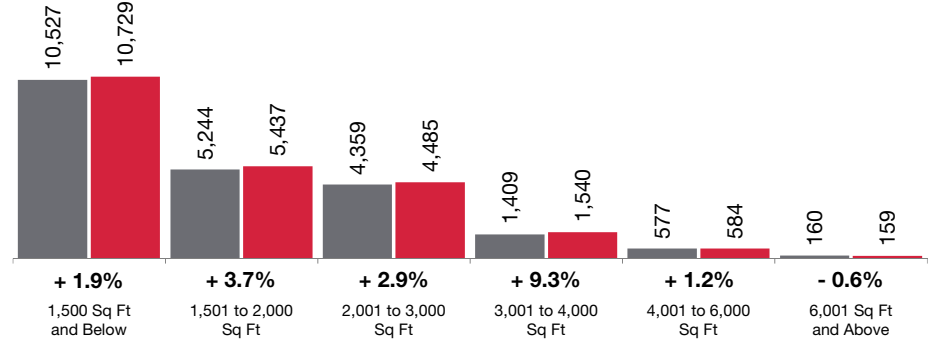
## By Price Range

■ 07-2024 ■ 07-2025



## By Square Feet

■ 07-2024 ■ 07-2025



## All Properties

By Price Range	07-2024	07-2025	Change
\$250,000 and Below	50	71	+ 42.0%
\$250,001 to \$500,000	1,903	1,931	+ 1.5%
\$500,001 to \$750,000	5,717	5,410	- 5.4%
\$750,001 to \$1,000,000	13,864	13,694	- 1.2%
\$1,000,001 to \$1,250,000	2,640	2,830	+ 7.2%
\$1,250,001 to \$2,000,000	3,668	4,025	+ 9.7%
\$2,000,001 to \$5,000,000	1,847	2,097	+ 13.5%
\$5,000,001 and Above	257	287	+ 11.7%
All Price Ranges	22,276	22,934	+ 3.0%

## Single-Family Homes

07-2024	07-2025	Change	07-2024	07-2025	Change
28	34	+ 21.4%	22	37	+ 68.2%
211	214	+ 1.4%	1,692	1,717	+ 1.5%
2,357	2,119	- 10.1%	3,360	3,291	- 2.1%
7,167	7,069	- 1.4%	6,697	6,625	- 1.1%
2,126	2,316	+ 8.9%	514	514	0.0%
3,021	3,398	+ 12.5%	647	627	- 3.1%
1,592	1,815	+ 14.0%	255	282	+ 10.6%
250	273	+ 9.2%	7	14	+ 100.0%
14,156	14,872	+ 5.1%	8,120	8,062	- 0.7%

## Condos - Townhomes

By Square Feet	07-2024	07-2025	Change
1,500 Sq Ft and Below	10,527	10,729	+ 1.9%
1,501 to 2,000 Sq Ft	5,244	5,437	+ 3.7%
2,001 to 3,000 Sq Ft	4,359	4,485	+ 2.9%
3,001 to 4,000 Sq Ft	1,409	1,540	+ 9.3%
4,001 to 6,000 Sq Ft	577	584	+ 1.2%
6,001 Sq Ft and Above	160	159	- 0.6%
All Square Footage	22,276	22,934	+ 3.0%

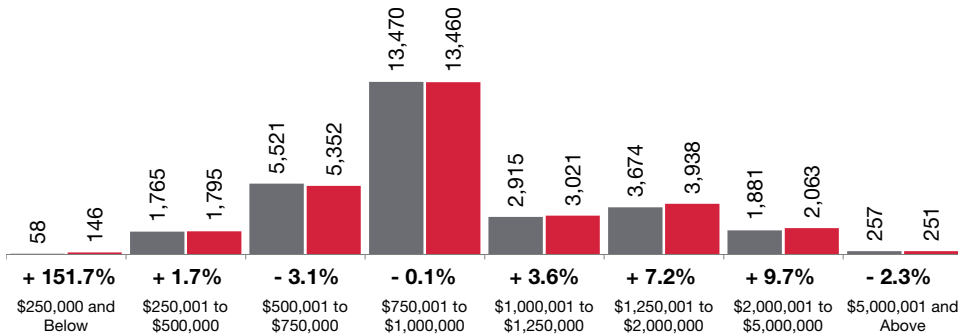
07-2024	07-2025	Change	07-2024	07-2025	Change
4,328	4,531	+ 4.7%	6,199	6,198	- 0.0%
3,769	3,978	+ 5.5%	1,475	1,459	- 1.1%
3,963	4,125	+ 4.1%	396	360	- 9.1%
1,370	1,507	+ 10.0%	39	33	- 15.4%
567	574	+ 1.2%	10	10	0.0%
159	157	- 1.3%	1	2	+ 100.0%
14,156	14,872	+ 5.1%	8,120	8,062	- 0.7%

# Closed Sales

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

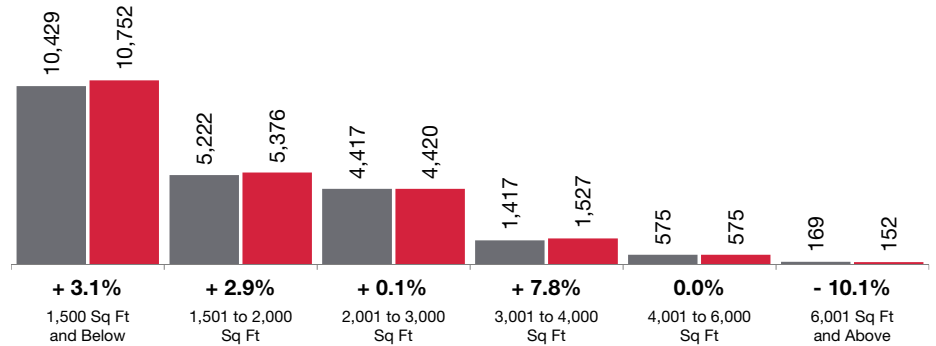
## By Price Range

■ 07-2024 ■ 07-2025



## By Square Feet

■ 07-2024 ■ 07-2025



## All Properties

By Price Range	07-2024	07-2025	Change
\$250,000 and Below	58	146	+ 151.7%
\$250,001 to \$500,000	1,765	1,795	+ 1.7%
\$500,001 to \$750,000	5,521	5,352	- 3.1%
\$750,001 to \$1,000,000	13,470	13,460	- 0.1%
\$1,000,001 to \$1,250,000	2,915	3,021	+ 3.6%
\$1,250,001 to \$2,000,000	3,674	3,938	+ 7.2%
\$2,000,001 to \$5,000,000	1,881	2,063	+ 9.7%
\$5,000,001 and Above	257	251	- 2.3%
All Price Ranges	22,197	22,802	+ 2.7%

## Single-Family Homes

07-2024	07-2025	Change	07-2024	07-2025	Change
30	86	+ 186.7%	28	60	+ 114.3%
201	189	- 6.0%	1,564	1,606	+ 2.7%
2,151	1,970	- 8.4%	3,370	3,382	+ 0.4%
6,867	6,863	- 0.1%	6,603	6,597	- 0.1%
2,361	2,465	+ 4.4%	554	556	+ 0.4%
3,023	3,344	+ 10.6%	651	594	- 8.8%
1,634	1,792	+ 9.7%	247	271	+ 9.7%
251	244	- 2.8%	6	7	+ 16.7%
14,136	14,755	+ 4.4%	8,061	8,047	- 0.2%

## Condos - Townhomes

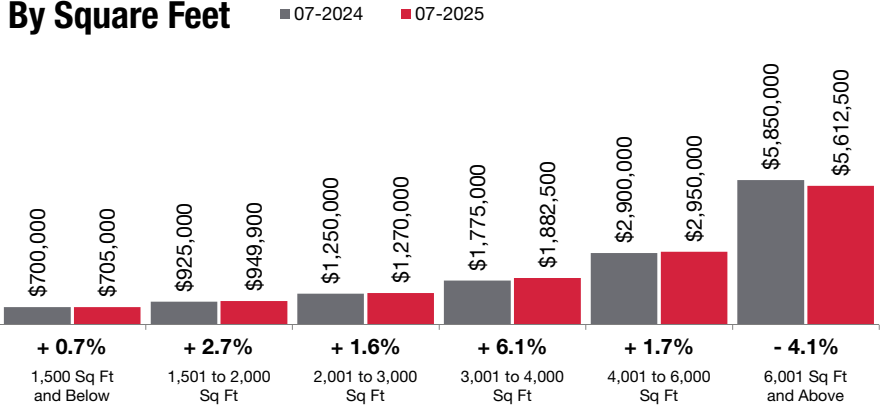
By Square Feet	07-2024	07-2025	Change
1,500 Sq Ft and Below	10,429	10,752	+ 3.1%
1,501 to 2,000 Sq Ft	5,222	5,376	+ 2.9%
2,001 to 3,000 Sq Ft	4,417	4,420	+ 0.1%
3,001 to 4,000 Sq Ft	1,417	1,527	+ 7.8%
4,001 to 6,000 Sq Ft	575	575	0.0%
6,001 Sq Ft and Above	169	152	- 10.1%
All Square Footage	22,197	22,802	+ 2.7%

07-2024	07-2025	Change	07-2024	07-2025	Change
4,253	4,571	+ 7.5%	6,176	6,181	+ 0.1%
3,782	3,905	+ 3.3%	1,440	1,471	+ 2.2%
3,992	4,071	+ 2.0%	393	349	- 11.2%
1,379	1,491	+ 8.1%	38	36	- 5.3%
562	566	+ 0.7%	13	9	- 30.8%
168	151	- 10.1%	1	1	0.0%
14,136	14,755	+ 4.4%	8,061	8,047	- 0.2%

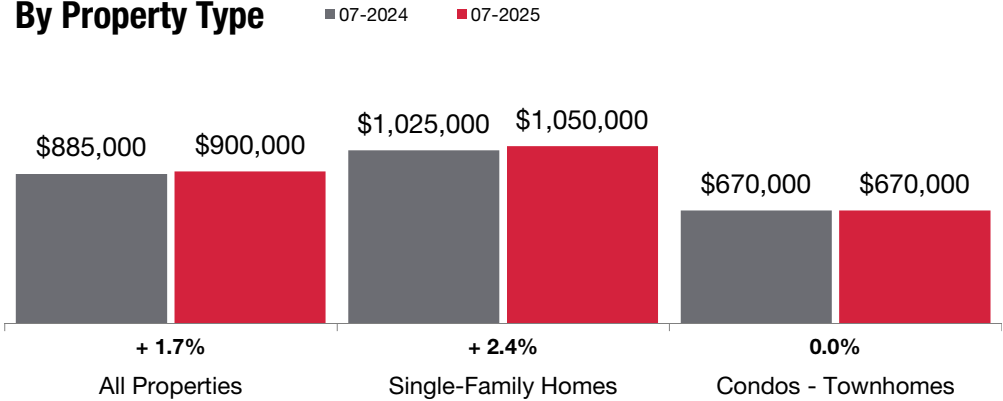
# Median Sales Price

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.**

## By Square Feet



## By Property Type

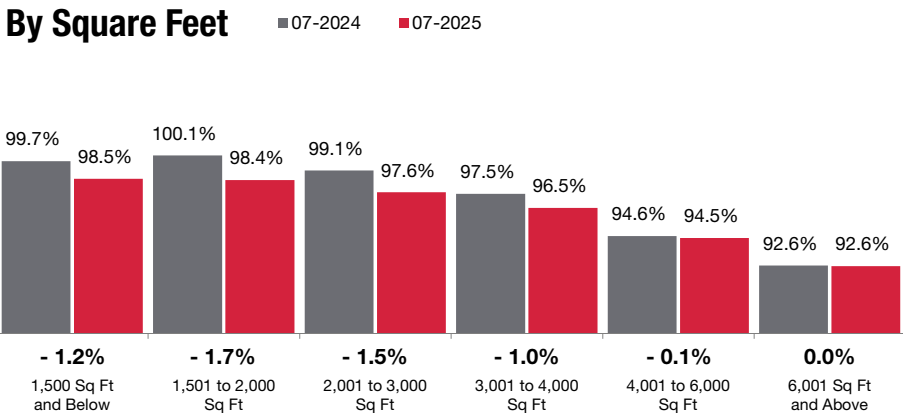
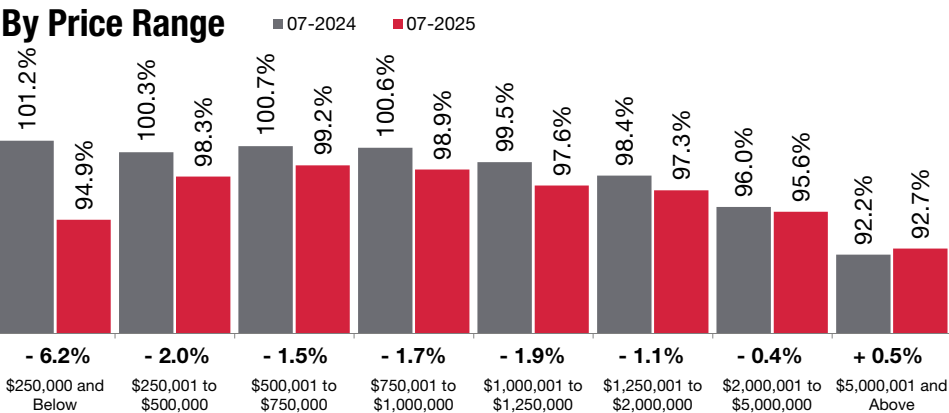


All Properties			
By Square Feet	07-2024	07-2025	Change
1,500 Sq Ft and Below	\$700,000	\$705,000	+ 0.7%
1,501 to 2,000 Sq Ft	\$925,000	\$949,900	+ 2.7%
2,001 to 3,000 Sq Ft	\$1,250,000	\$1,270,000	+ 1.6%
3,001 to 4,000 Sq Ft	\$1,775,000	\$1,882,500	+ 6.1%
4,001 to 6,000 Sq Ft	\$2,900,000	\$2,950,000	+ 1.7%
6,001 Sq Ft and Above	\$5,850,000	\$5,612,500	- 4.1%
All Square Footage	\$885,000	\$900,000	+ 1.7%

Single-Family Homes			Condos - Townhomes		
07-2024	07-2025	Change	07-2024	07-2025	Change
\$785,000	\$800,000	+ 1.9%	\$610,000	\$609,950	- 0.0%
\$930,000	\$960,000	+ 3.2%	\$900,000	\$900,000	0.0%
\$1,225,000	\$1,250,000	+ 2.0%	\$1,500,000	\$1,500,000	0.0%
\$1,770,000	\$1,862,500	+ 5.2%	\$2,250,000	\$2,512,500	+ 11.7%
\$2,864,400	\$2,950,000	+ 3.0%	\$4,030,000	\$3,550,000	- 11.9%
\$5,850,000	\$5,625,000	- 3.8%	\$2,250,000	\$631,099	- 72.0%
\$1,025,000	\$1,050,000	+ 2.4%	\$670,000	\$670,000	0.0%

# 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.**



All Properties			
By Price Range	07-2024	07-2025	Change
\$250,000 and Below	101.2%	94.9%	- 6.2%
\$250,001 to \$500,000	100.3%	98.3%	- 2.0%
\$500,001 to \$750,000	100.7%	99.2%	- 1.5%
\$750,001 to \$1,000,000	100.6%	98.9%	- 1.7%
\$1,000,001 to \$1,250,000	99.5%	97.6%	- 1.9%
\$1,250,001 to \$2,000,000	98.4%	97.3%	- 1.1%
\$2,000,001 to \$5,000,000	96.0%	95.6%	- 0.4%
\$5,000,001 and Above	92.2%	92.7%	+ 0.5%
All Price Ranges	99.6%	98.1%	- 1.5%

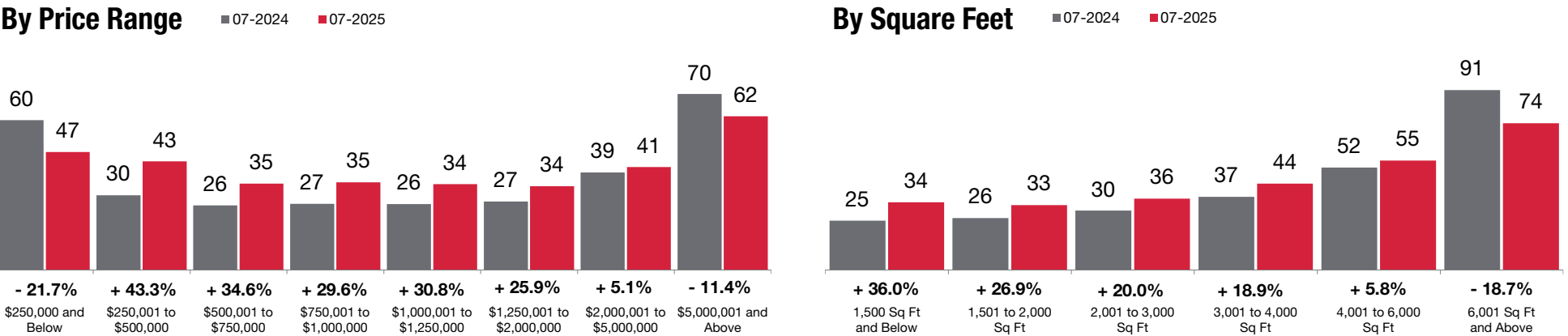
Single-Family Homes			Condos - Townhomes		
07-2024	07-2025	Change	07-2024	07-2025	Change
98.8%	91.6%	- 7.3%	103.6%	98.7%	- 4.7%
100.6%	99.7%	- 0.9%	100.2%	98.2%	- 2.0%
101.6%	100.4%	- 1.2%	100.2%	98.5%	- 1.7%
101.1%	99.5%	- 1.6%	100.1%	98.2%	- 1.9%
99.7%	97.8%	- 1.9%	98.6%	97.0%	- 1.6%
98.7%	97.4%	- 1.3%	97.1%	96.7%	- 0.4%
96.2%	95.7%	- 0.5%	94.6%	94.6%	0.0%
92.3%	92.5%	+ 0.2%	88.2%	95.8%	+ 8.6%
99.6%	98.1%	- 1.5%	99.6%	97.9%	- 1.7%

By Square Feet	07-2024	07-2025	Change
1,500 Sq Ft and Below	99.7%	98.5%	- 1.2%
1,501 to 2,000 Sq Ft	100.1%	98.4%	- 1.7%
2,001 to 3,000 Sq Ft	99.1%	97.6%	- 1.5%
3,001 to 4,000 Sq Ft	97.5%	96.5%	- 1.0%
4,001 to 6,000 Sq Ft	94.6%	94.5%	- 0.1%
6,001 Sq Ft and Above	92.6%	92.6%	0.0%
All Square Footage	99.6%	98.1%	- 1.5%

07-2024	07-2025	Change	07-2024	07-2025	Change
100.9%	99.2%	- 1.7%	99.8%	98.0%	- 1.8%
100.5%	98.7%	- 1.8%	99.2%	97.8%	- 1.4%
99.2%	97.6%	- 1.6%	97.7%	97.2%	- 0.5%
97.6%	96.6%	- 1.0%	94.0%	93.2%	- 0.9%
94.7%	94.6%	- 0.1%	90.5%	90.3%	- 0.2%
92.7%	92.5%	- 0.2%	77.6%	102.5%	+ 32.1%
99.6%	98.1%	- 1.5%	99.6%	97.9%	- 1.7%

# 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.



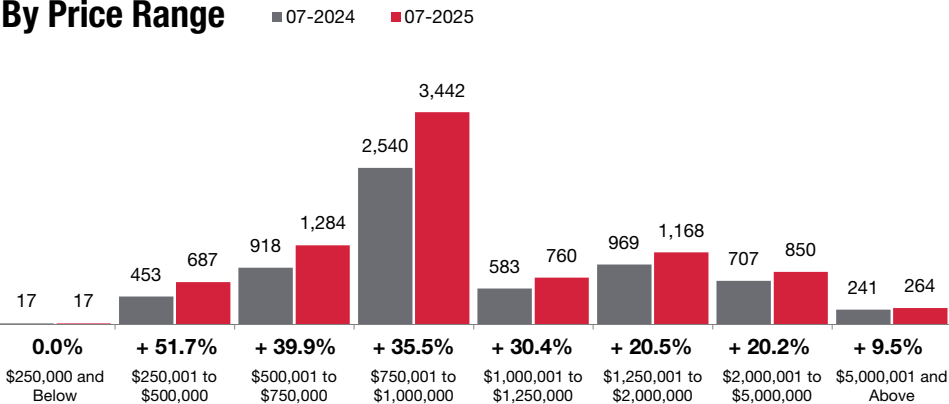
All Properties				Single-Family Homes			Condos - Townhomes		
By Price Range	07-2024	07-2025	Change	07-2024	07-2025	Change	07-2024	07-2025	Change
\$250,000 and Below	60	47	- 21.7%	67	45	- 32.8%	52	51	- 1.9%
\$250,001 to \$500,000	30	43	+ 43.3%	37	50	+ 35.1%	29	43	+ 48.3%
\$500,001 to \$750,000	26	35	+ 34.6%	26	32	+ 23.1%	26	36	+ 38.5%
\$750,001 to \$1,000,000	27	35	+ 29.6%	26	32	+ 23.1%	27	38	+ 40.7%
\$1,000,001 to \$1,250,000	26	34	+ 30.8%	26	34	+ 30.8%	29	37	+ 27.6%
\$1,250,001 to \$2,000,000	27	34	+ 25.9%	27	33	+ 22.2%	30	36	+ 20.0%
\$2,000,001 to \$5,000,000	39	41	+ 5.1%	37	40	+ 8.1%	50	47	- 6.0%
\$5,000,001 and Above	70	62	- 11.4%	71	63	- 11.3%	58	27	- 53.4%
All Price Ranges	28	36	+ 28.6%	29	34	+ 17.2%	28	38	+ 35.7%

By Square Feet	07-2024	07-2025	Change	07-2024	07-2025	Change	07-2024	07-2025	Change
1,500 Sq Ft and Below	25	34	+ 36.0%	23	29	+ 26.1%	26	38	+ 46.2%
1,501 to 2,000 Sq Ft	26	33	+ 26.9%	25	30	+ 20.0%	30	40	+ 33.3%
2,001 to 3,000 Sq Ft	30	36	+ 20.0%	29	36	+ 24.1%	39	39	0.0%
3,001 to 4,000 Sq Ft	37	44	+ 18.9%	37	43	+ 16.2%	48	61	+ 27.1%
4,001 to 6,000 Sq Ft	52	55	+ 5.8%	50	55	+ 10.0%	122	65	- 46.7%
6,001 Sq Ft and Above	91	74	- 18.7%	90	74	- 17.8%	142	27	- 81.0%
All Square Footage	28	36	+ 28.6%	29	34	+ 17.2%	28	38	+ 35.7%

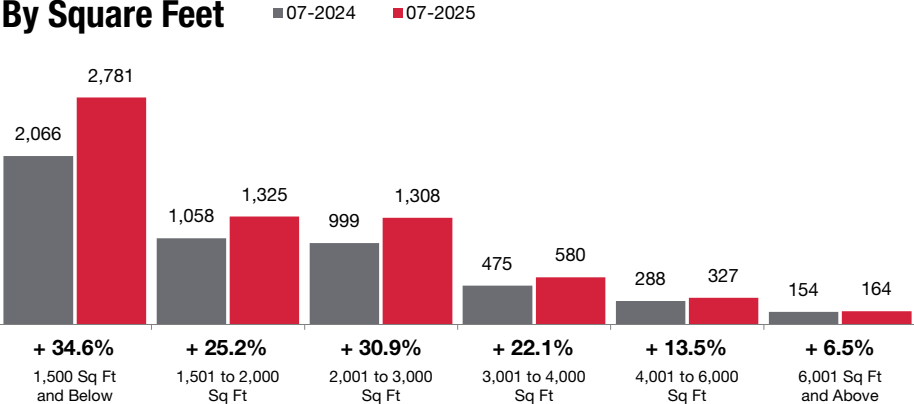
# Inventory of Homes for Sale

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	07-2024	07-2025	Change
\$250,000 and Below	17	17	0.0%
\$250,001 to \$500,000	453	687	+ 51.7%
\$500,001 to \$750,000	918	1,284	+ 39.9%
\$750,001 to \$1,000,000	2,540	3,442	+ 35.5%
\$1,000,001 to \$1,250,000	583	760	+ 30.4%
\$1,250,001 to \$2,000,000	969	1,168	+ 20.5%
\$2,000,001 to \$5,000,000	707	850	+ 20.2%
\$5,000,001 and Above	241	264	+ 9.5%
All Price Ranges	5,040	6,485	+ 28.7%

### Single-Family Homes

07-2024	07-2025	Change
7	5	- 28.6%
50	59	+ 18.0%
256	290	+ 13.3%
1,103	1,330	+ 20.6%
440	596	+ 35.5%
755	921	+ 22.0%
576	707	+ 22.7%
227	253	+ 11.5%
3,101	3,808	+ 22.8%

### Condos - Townhomes

07-2024	07-2025	Change
10	12	+ 20.0%
403	628	+ 55.8%
662	994	+ 50.2%
1,437	2,112	+ 47.0%
143	164	+ 14.7%
214	247	+ 15.4%
131	143	+ 9.2%
14	11	- 21.4%
1,939	2,677	+ 38.1%

By Square Feet	07-2024	07-2025	Change
1,500 Sq Ft and Below	2,066	2,781	+ 34.6%
1,501 to 2,000 Sq Ft	1,058	1,325	+ 25.2%
2,001 to 3,000 Sq Ft	999	1,308	+ 30.9%
3,001 to 4,000 Sq Ft	475	580	+ 22.1%
4,001 to 6,000 Sq Ft	288	327	+ 13.5%
6,001 Sq Ft and Above	154	164	+ 6.5%
All Square Footage	5,040	6,485	+ 28.7%

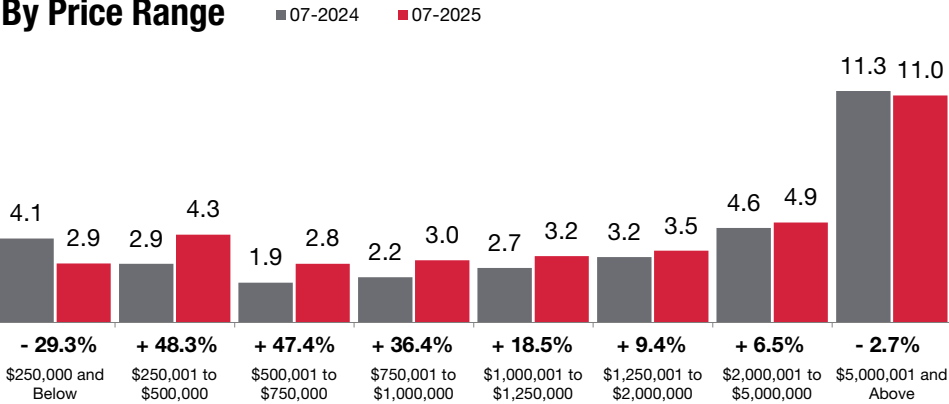
07-2024	07-2025	Change
673	791	+ 17.5%
676	841	+ 24.4%
872	1,130	+ 29.6%
448	563	+ 25.7%
278	320	+ 15.1%
154	163	+ 5.8%
3,101	3,808	+ 22.8%

07-2024	07-2025	Change
1,393	1,990	+ 42.9%
382	484	+ 26.7%
127	178	+ 40.2%
27	17	- 37.0%
10	7	- 30.0%
0	1	--
1,939	2,677	+ 38.1%

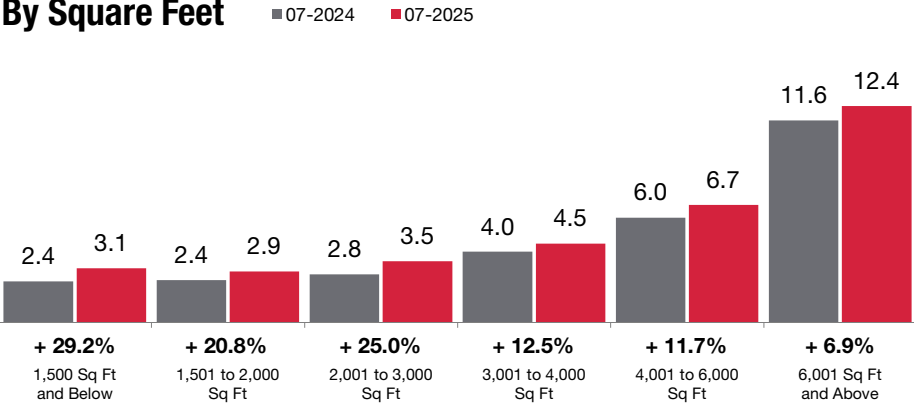
# Months Supply of Inventory

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



## By Square Feet



### All Properties

By Price Range	07-2024	07-2025	Change
\$250,000 and Below	4.1	2.9	- 29.3%
\$250,001 to \$500,000	2.9	4.3	+ 48.3%
\$500,001 to \$750,000	1.9	2.8	+ 47.4%
\$750,001 to \$1,000,000	2.2	3.0	+ 36.4%
\$1,000,001 to \$1,250,000	2.7	3.2	+ 18.5%
\$1,250,001 to \$2,000,000	3.2	3.5	+ 9.4%
\$2,000,001 to \$5,000,000	4.6	4.9	+ 6.5%
\$5,000,001 and Above	11.3	11.0	- 2.7%
All Price Ranges	2.7	3.4	+ 25.9%

### Single-Family Homes

07-2024	07-2025	Change
2.8	1.8	- 35.7%
2.8	3.3	+ 17.9%
1.3	1.6	+ 23.1%
1.8	2.3	+ 27.8%
2.5	3.1	+ 24.0%
3.0	3.3	+ 10.0%
4.3	4.7	+ 9.3%
10.9	11.1	+ 1.8%
2.6	3.1	+ 19.2%

### Condos - Townhomes

07-2024	07-2025	Change
4.1	3.6	- 12.2%
2.9	4.4	+ 51.7%
2.4	3.6	+ 50.0%
2.6	3.8	+ 46.2%
3.3	3.8	+ 15.2%
4.0	4.7	+ 17.5%
6.2	6.1	- 1.6%
10.0	7.1	- 29.0%
2.9	4.0	+ 37.9%

By Square Feet	07-2024	07-2025	Change
1,500 Sq Ft and Below	2.4	3.1	+ 29.2%
1,501 to 2,000 Sq Ft	2.4	2.9	+ 20.8%
2,001 to 3,000 Sq Ft	2.8	3.5	+ 25.0%
3,001 to 4,000 Sq Ft	4.0	4.5	+ 12.5%
4,001 to 6,000 Sq Ft	6.0	6.7	+ 11.7%
6,001 Sq Ft and Above	11.6	12.4	+ 6.9%
All Square Footage	2.7	3.4	+ 25.9%

07-2024	07-2025	Change
1.9	2.1	+ 10.5%
2.2	2.5	+ 13.6%
2.6	3.3	+ 26.9%
3.9	4.5	+ 15.4%
5.9	6.7	+ 13.6%
11.6	12.5	+ 7.8%
2.6	3.1	+ 19.2%
2.9	4.0	+ 37.9%