

Housing Supply Overview

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

January 2026

U.S. pending home sales fell 9.3% from the previous month, according to the National Association of REALTORS®. The drop in contract signings was broad-based, with all four regions reporting declines. On a year-over-year basis, pending home sales were down 3.0%, with the South recording a modest gain while the Northeast, West, and Midwest posted declines. For the 12-month period spanning February 2025 through January 2026, Pending Sales in the San Diego were down 1.1 percent overall. The price range with the largest gain in sales was the \$5,000,001 and Above range, where they increased 6.4 percent.

The overall Median Sales Price remained flat at \$900,000. The property type with the largest price gain was the Single-Family Homes segment, where prices increased 0.5 percent to \$1,055,000. 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 74 days.

Market-wide, inventory levels were down 11.2 percent. The property type with the smallest decline was the Condos - Townhomes segment, where they decreased 3.1 percent. That amounts to 1.8 months supply for Single-Family homes and 2.7 months supply for Condos.

Quick Facts

+ 6.4%	+ 6.9%	+ 0.2%
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.

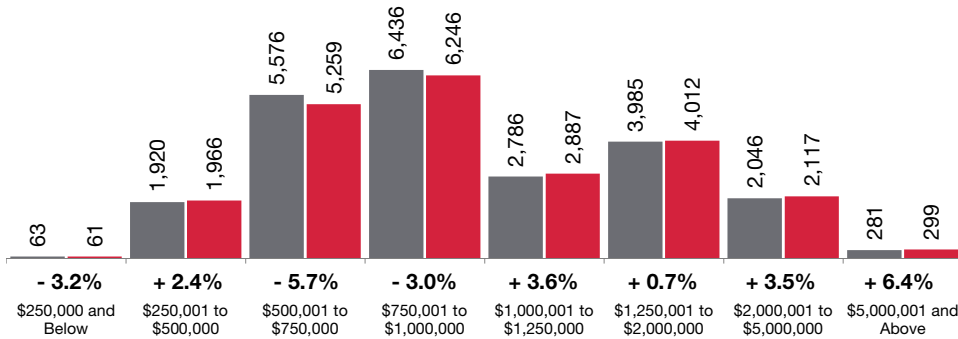
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Pending Sales

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

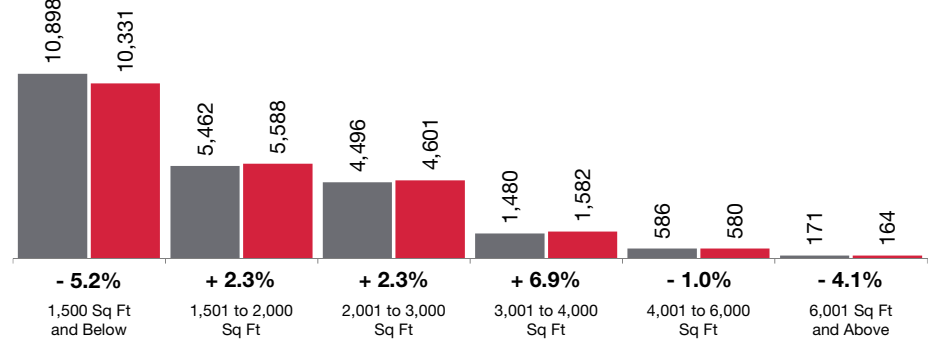
By Price Range

■ 01-2025 ■ 01-2026



By Square Feet

■ 01-2025 ■ 01-2026



All Properties

By Price Range	01-2025	01-2026	Change
\$250,000 and Below	63	61	- 3.2%
\$250,001 to \$500,000	1,920	1,966	+ 2.4%
\$500,001 to \$750,000	5,576	5,259	- 5.7%
\$750,001 to \$1,000,000	6,436	6,246	- 3.0%
\$1,000,001 to \$1,250,000	2,786	2,887	+ 3.6%
\$1,250,001 to \$2,000,000	3,985	4,012	+ 0.7%
\$2,000,001 to \$5,000,000	2,046	2,117	+ 3.5%
\$5,000,001 and Above	281	299	+ 6.4%
All Price Ranges	23,093	22,847	- 1.1%

Single-Family Homes

01-2025	01-2026	Change
34	22	- 35.3%
224	197	- 12.1%
2,194	2,051	- 6.5%
4,745	4,764	+ 0.4%
2,274	2,352	+ 3.4%
3,320	3,391	+ 2.1%
1,783	1,814	+ 1.7%
274	287	+ 4.7%
14,848	14,878	+ 0.2%

Condos - Townhomes

01-2025	01-2026	Change
29	39	+ 34.5%
1,696	1,769	+ 4.3%
3,382	3,208	- 5.1%
1,691	1,482	- 12.4%
512	535	+ 4.5%
665	621	- 6.6%
263	303	+ 15.2%
7	12	+ 71.4%
8,245	7,969	- 3.3%

By Square Feet

01-2025	01-2026	Change
10,898	10,331	- 5.2%
5,462	5,588	+ 2.3%
4,496	4,601	+ 2.3%
1,480	1,582	+ 6.9%
586	580	- 1.0%
171	164	- 4.1%
23,093	22,847	- 1.1%

01-2025	01-2026	Change
4,591	4,326	- 5.8%
3,949	4,075	+ 3.2%
4,124	4,206	+ 2.0%
1,440	1,536	+ 6.7%
574	572	- 0.3%
170	162	- 4.7%
14,848	14,878	+ 0.2%

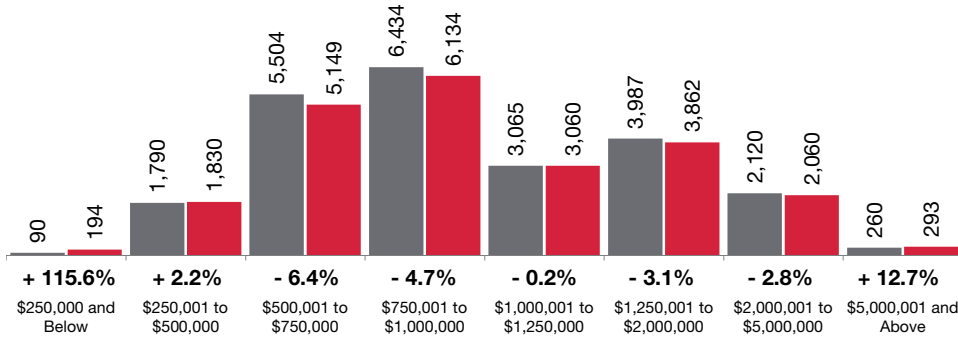
01-2025	01-2026	Change
6,307	6,005	- 4.8%
1,513	1,513	0.0%
372	395	+ 6.2%
40	46	+ 15.0%
12	8	- 33.3%
1	2	+ 100.0%
8,245	7,969	- 3.3%

Closed Sales

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

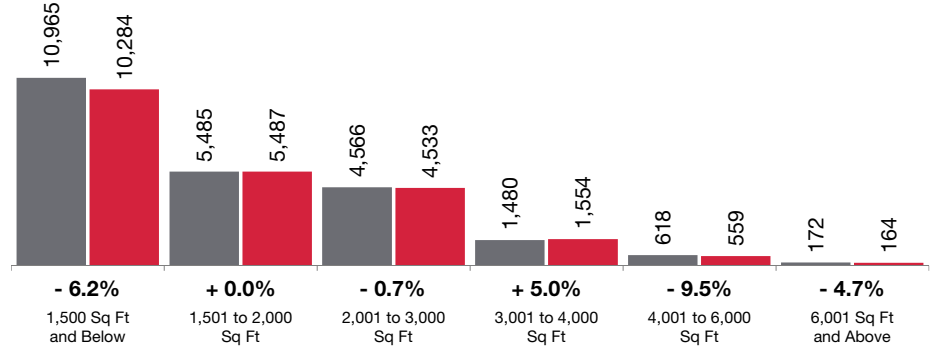
By Price Range

■ 01-2025 ■ 01-2026



By Square Feet

■ 01-2025 ■ 01-2026



All Properties

By Price Range	01-2025	01-2026	Change
\$250,000 and Below	90	194	+ 115.6%
\$250,001 to \$500,000	1,790	1,830	+ 2.2%
\$500,001 to \$750,000	5,504	5,149	- 6.4%
\$750,001 to \$1,000,000	6,434	6,134	- 4.7%
\$1,000,001 to \$1,250,000	3,065	3,060	- 0.2%
\$1,250,001 to \$2,000,000	3,987	3,862	- 3.1%
\$2,000,001 to \$5,000,000	2,120	2,060	- 2.8%
\$5,000,001 and Above	260	293	+ 12.7%
All Price Ranges	23,250	22,582	- 2.9%

Single-Family Homes

01-2025	01-2026	Change
46	93	+ 102.2%
203	190	- 6.4%
2,003	1,905	- 4.9%
4,745	4,650	- 2.0%
2,502	2,518	+ 0.6%
3,323	3,260	- 1.9%
1,848	1,776	- 3.9%
255	274	+ 7.5%
14,925	14,666	- 1.7%

Condos - Townhomes

01-2025	01-2026	Change
44	101	+ 129.5%
1,587	1,640	+ 3.3%
3,501	3,244	- 7.3%
1,689	1,484	- 12.1%
563	542	- 3.7%
664	602	- 9.3%
272	284	+ 4.4%
5	19	+ 280.0%
8,325	7,916	- 4.9%

By Square Feet

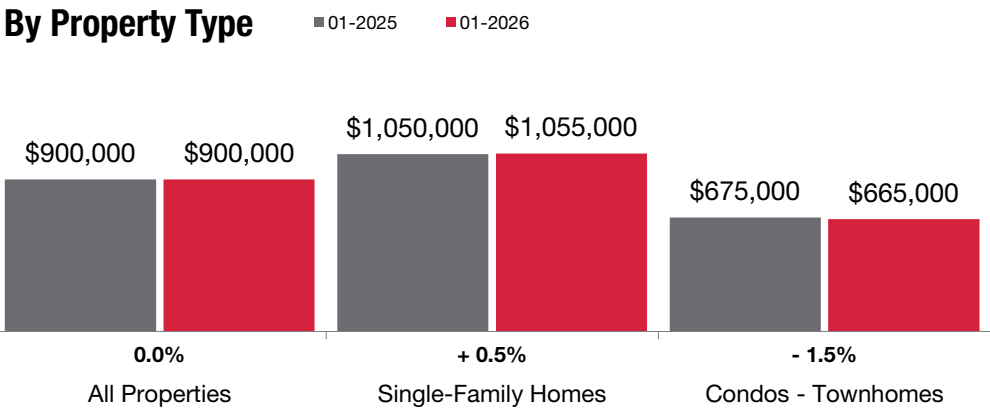
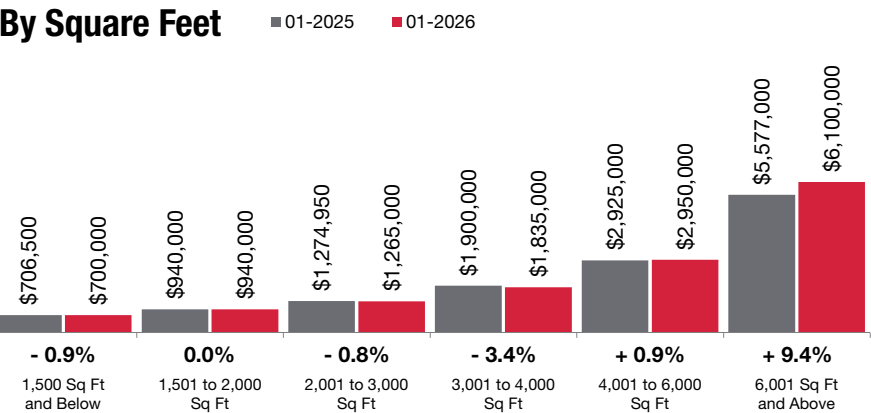
01-2025	01-2026	Change
10,965	10,284	- 6.2%
5,485	5,487	+ 0.0%
4,566	4,533	- 0.7%
1,480	1,554	+ 5.0%
618	559	- 9.5%
172	164	- 4.7%
23,250	22,582	- 2.9%

01-2025	01-2026	Change
4,612	4,284	- 7.1%
3,953	4,015	+ 1.6%
4,147	4,140	- 0.2%
1,438	1,513	+ 5.2%
604	551	- 8.8%
171	162	- 5.3%
14,925	14,666	- 1.7%

01-2025	01-2026	Change
6,353	6,000	- 5.6%
1,532	1,472	- 3.9%
383	393	+ 2.6%
42	41	- 2.4%
14	8	- 42.9%
1	2	+ 100.0%
8,325	7,916	- 4.9%

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.**



All Properties			
By Square Feet	01-2025	01-2026	Change
1,500 Sq Ft and Below	\$706,500	\$700,000	- 0.9%
1,501 to 2,000 Sq Ft	\$940,000	\$940,000	0.0%
2,001 to 3,000 Sq Ft	\$1,274,950	\$1,265,000	- 0.8%
3,001 to 4,000 Sq Ft	\$1,900,000	\$1,835,000	- 3.4%
4,001 to 6,000 Sq Ft	\$2,925,000	\$2,950,000	+ 0.9%
6,001 Sq Ft and Above	\$5,577,000	\$6,100,000	+ 9.4%
All Square Footage	\$900,000	\$900,000	0.0%

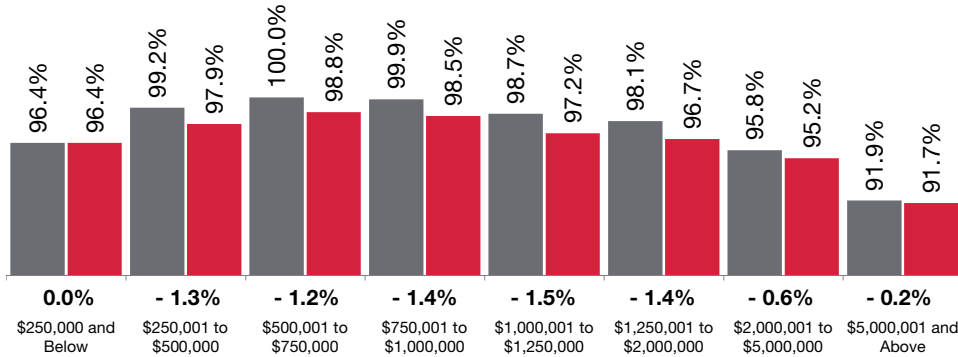
Single-Family Homes			Condos - Townhomes		
01-2025	01-2026	Change	01-2025	01-2026	Change
\$800,000	\$800,000	0.0%	\$610,000	\$600,000	- 1.6%
\$950,000	\$950,000	0.0%	\$895,000	\$900,000	+ 0.6%
\$1,250,000	\$1,250,000	0.0%	\$1,500,000	\$1,550,000	+ 3.3%
\$1,895,500	\$1,817,000	- 4.1%	\$2,462,500	\$2,350,000	- 4.6%
\$2,900,000	\$2,950,000	+ 1.7%	\$3,930,000	\$3,549,500	- 9.7%
\$5,600,000	\$6,100,000	+ 8.9%	\$2,250,000	\$3,690,550	+ 64.0%
\$1,050,000	\$1,055,000	+ 0.5%	\$675,000	\$665,000	- 1.5%

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.**

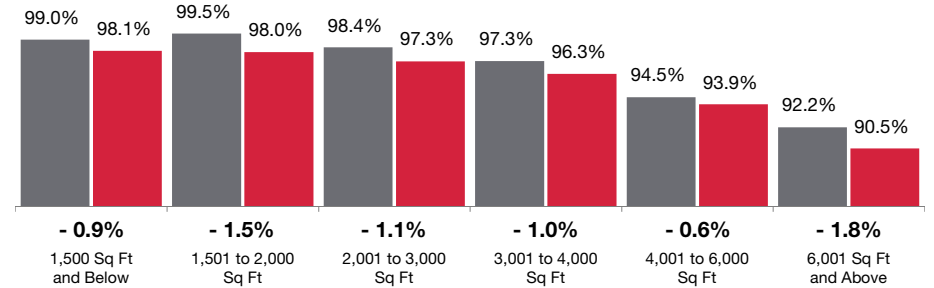
By Price Range

■ 01-2025 ■ 01-2026



By Square Feet

■ 01-2025 ■ 01-2026



All Properties

By Price Range	01-2025	01-2026	Change
\$250,000 and Below	96.4%	96.4%	0.0%
\$250,001 to \$500,000	99.2%	97.9%	- 1.3%
\$500,001 to \$750,000	100.0%	98.8%	- 1.2%
\$750,001 to \$1,000,000	99.9%	98.5%	- 1.4%
\$1,000,001 to \$1,250,000	98.7%	97.2%	- 1.5%
\$1,250,001 to \$2,000,000	98.1%	96.7%	- 1.4%
\$2,000,001 to \$5,000,000	95.8%	95.2%	- 0.6%
\$5,000,001 and Above	91.9%	91.7%	- 0.2%
All Price Ranges	98.9%	97.6%	- 1.3%

Single-Family Homes

01-2025	01-2026	Change	01-2025	01-2026	Change
94.8%	92.4%	- 2.5%	98.3%	99.4%	+ 1.1%
100.7%	98.3%	- 2.4%	99.0%	97.9%	- 1.1%
101.0%	100.3%	- 0.7%	99.4%	98.0%	- 1.4%
100.2%	98.9%	- 1.3%	98.9%	97.5%	- 1.4%
98.9%	97.4%	- 1.5%	98.0%	96.3%	- 1.7%
98.3%	96.9%	- 1.4%	97.2%	95.9%	- 1.3%
96.1%	95.3%	- 0.8%	94.4%	94.7%	+ 0.3%
92.1%	91.5%	- 0.7%	86.9%	95.3%	+ 9.7%
99.0%	97.7%	- 1.3%	98.7%	97.4%	- 1.3%

Condos - Townhomes

By Square Feet	01-2025	01-2026	Change
1,500 Sq Ft and Below	99.0%	98.1%	- 0.9%
1,501 to 2,000 Sq Ft	99.5%	98.0%	- 1.5%
2,001 to 3,000 Sq Ft	98.4%	97.3%	- 1.1%
3,001 to 4,000 Sq Ft	97.3%	96.3%	- 1.0%
4,001 to 6,000 Sq Ft	94.5%	93.9%	- 0.6%
6,001 Sq Ft and Above	92.2%	90.5%	- 1.8%
All Square Footage	98.9%	97.6%	- 1.3%

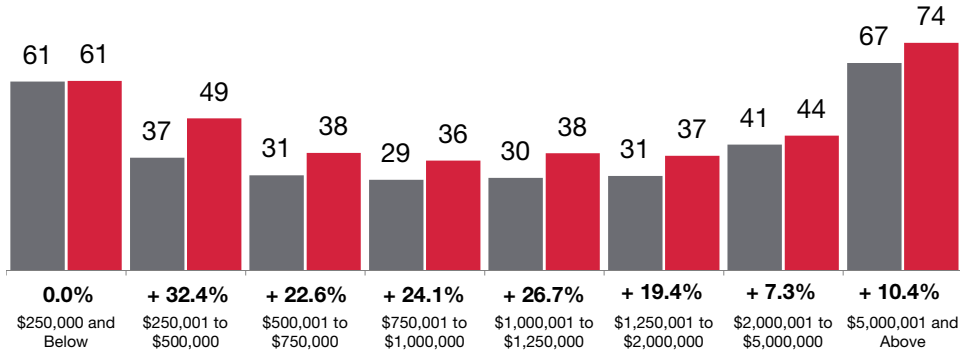
01-2025	01-2026	Change	01-2025	01-2026	Change
100.2%	98.8%	- 1.4%	98.9%	97.6%	- 1.3%
99.8%	98.3%	- 1.5%	98.7%	97.2%	- 1.5%
98.5%	97.3%	- 1.2%	97.3%	96.8%	- 0.5%
97.4%	96.4%	- 1.0%	92.9%	94.2%	+ 1.4%
94.7%	94.0%	- 0.7%	88.3%	91.8%	+ 4.0%
92.2%	90.5%	- 1.8%	77.6%	93.4%	+ 20.4%
99.0%	97.7%	- 1.3%	98.7%	97.4%	- 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.

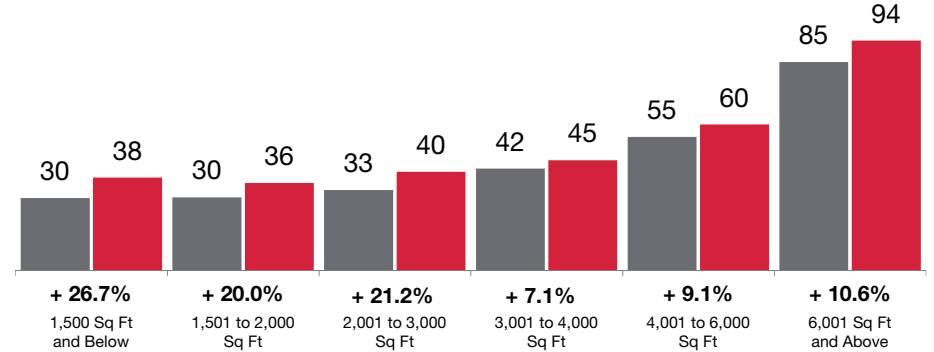
By Price Range

■ 01-2025 ■ 01-2026



By Square Feet

■ 01-2025 ■ 01-2026



All Properties

By Price Range	01-2025	01-2026	Change
\$250,000 and Below	61	61	0.0%
\$250,001 to \$500,000	37	49	+ 32.4%
\$500,001 to \$750,000	31	38	+ 22.6%
\$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	41	44	+ 7.3%
\$5,000,001 and Above	67	74	+ 10.4%
All Price Ranges	32	39	+ 21.9%

Single-Family Homes

01-2025	01-2026	Change	01-2025	01-2026	Change
64	56	- 12.5%	59	67	+ 13.6%
43	56	+ 30.2%	36	48	+ 33.3%
30	35	+ 16.7%	31	40	+ 29.0%
28	35	+ 25.0%	32	39	+ 21.9%
29	38	+ 31.0%	32	39	+ 21.9%
30	36	+ 20.0%	33	41	+ 24.2%
39	43	+ 10.3%	52	50	- 3.8%
68	75	+ 10.3%	57	59	+ 3.5%
31	38	+ 22.6%	33	42	+ 27.3%

Condos - Townhomes

By Square Feet	01-2025	01-2026	Change
1,500 Sq Ft and Below	30	38	+ 26.7%
1,501 to 2,000 Sq Ft	30	36	+ 20.0%
2,001 to 3,000 Sq Ft	33	40	+ 21.2%
3,001 to 4,000 Sq Ft	42	45	+ 7.1%
4,001 to 6,000 Sq Ft	55	60	+ 9.1%
6,001 Sq Ft and Above	85	94	+ 10.6%
All Square Footage	32	39	+ 21.9%

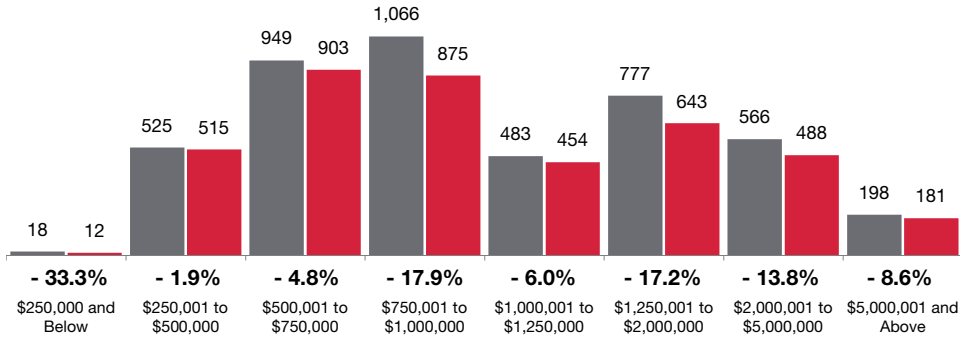
01-2025	01-2026	Change	01-2025	01-2026	Change
26	32	+ 23.1%	32	42	+ 31.3%
27	33	+ 22.2%	36	43	+ 19.4%
32	40	+ 25.0%	41	46	+ 12.2%
41	45	+ 9.8%	60	41	- 31.7%
54	60	+ 11.1%	87	59	- 32.2%
85	94	+ 10.6%	142	91	- 35.9%
31	38	+ 22.6%	33	42	+ 27.3%

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.

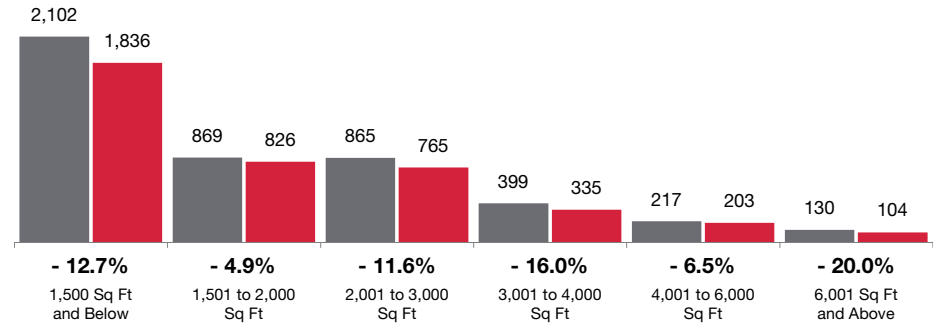
By Price Range

■ 01-2025 ■ 01-2026



By Square Feet

■ 01-2025 ■ 01-2026



All Properties

By Price Range	01-2025	01-2026	Change
\$250,000 and Below	18	12	- 33.3%
\$250,001 to \$500,000	525	515	- 1.9%
\$500,001 to \$750,000	949	903	- 4.8%
\$750,001 to \$1,000,000	1,066	875	- 17.9%
\$1,000,001 to \$1,250,000	483	454	- 6.0%
\$1,250,001 to \$2,000,000	777	643	- 17.2%
\$2,000,001 to \$5,000,000	566	488	- 13.8%
\$5,000,001 and Above	198	181	- 8.6%
All Price Ranges	4,582	4,071	- 11.2%

Single-Family Homes

01-2025	01-2026	Change	01-2025	01-2026	Change
7	4	- 42.9%	11	8	- 27.3%
60	51	- 15.0%	465	464	- 0.2%
279	240	- 14.0%	670	663	- 1.0%
719	555	- 22.8%	347	320	- 7.8%
370	342	- 7.6%	113	112	- 0.9%
631	502	- 20.4%	146	141	- 3.4%
463	410	- 11.4%	103	78	- 24.3%
196	168	- 14.3%	2	13	+ 550.0%
2,725	2,272	- 16.6%	1,857	1,799	- 3.1%

Condos - Townhomes

By Square Feet	01-2025	01-2026	Change
1,500 Sq Ft and Below	2,102	1,836	- 12.7%
1,501 to 2,000 Sq Ft	869	826	- 4.9%
2,001 to 3,000 Sq Ft	865	765	- 11.6%
3,001 to 4,000 Sq Ft	399	335	- 16.0%
4,001 to 6,000 Sq Ft	217	203	- 6.5%
6,001 Sq Ft and Above	130	104	- 20.0%
All Square Footage	4,582	4,071	- 11.2%

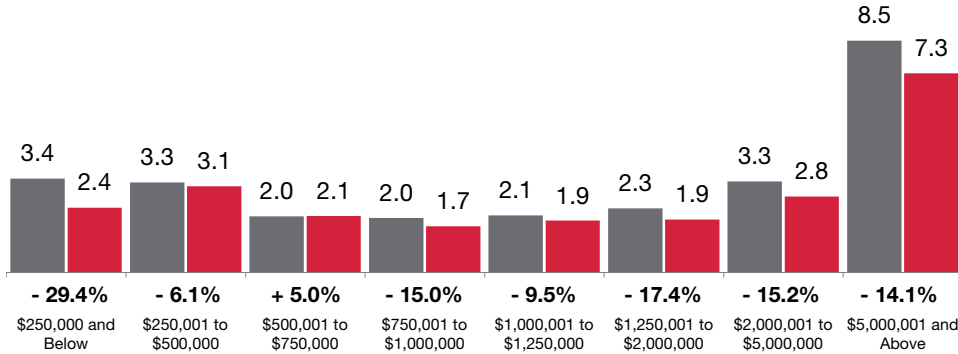
01-2025	01-2026	Change	01-2025	01-2026	Change
682	516	- 24.3%	1,420	1,320	- 7.0%
558	480	- 14.0%	311	346	+ 11.3%
757	664	- 12.3%	108	101	- 6.5%
385	321	- 16.6%	14	14	0.0%
214	188	- 12.1%	3	15	+ 400.0%
129	102	- 20.9%	1	2	+ 100.0%
2,725	2,272	- 16.6%	1,857	1,799	- 3.1%

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.

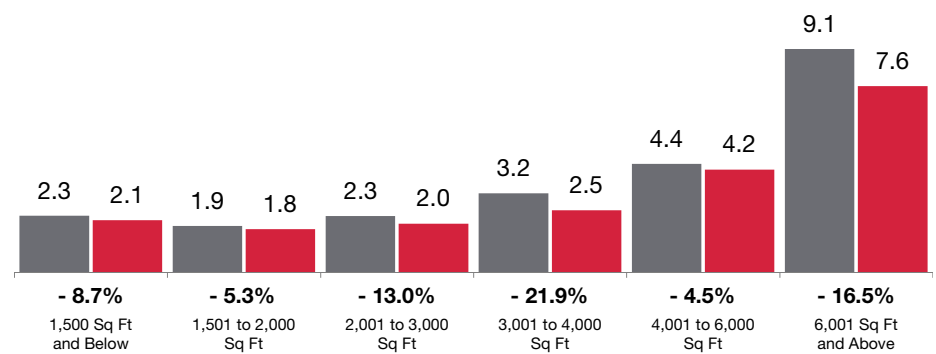
By Price Range

■ 01-2025 ■ 01-2026



By Square Feet

■ 01-2025 ■ 01-2026



All Properties

By Price Range	01-2025	01-2026	Change
\$250,000 and Below	3.4	2.4	-29.4%
\$250,001 to \$500,000	3.3	3.1	-6.1%
\$500,001 to \$750,000	2.0	2.1	+5.0%
\$750,001 to \$1,000,000	2.0	1.7	-15.0%
\$1,000,001 to \$1,250,000	2.1	1.9	-9.5%
\$1,250,001 to \$2,000,000	2.3	1.9	-17.4%
\$2,000,001 to \$5,000,000	3.3	2.8	-15.2%
\$5,000,001 and Above	8.5	7.3	-14.1%
All Price Ranges	2.4	2.1	-12.5%

Single-Family Homes

01-2025	01-2026	Change	01-2025	01-2026	Change
2.5	1.8	-28.0%	4.2	2.5	-40.5%
3.2	3.1	-3.1%	3.3	3.1	-6.1%
1.5	1.4	-6.7%	2.4	2.5	+4.2%
1.8	1.4	-22.2%	2.5	2.6	+4.0%
2.0	1.7	-15.0%	2.6	2.5	-3.8%
2.3	1.8	-21.7%	2.6	2.7	+3.8%
3.1	2.7	-12.9%	4.7	3.1	-34.0%
8.6	7.0	-18.6%	1.4	8.7	+521.4%
2.2	1.8	-18.2%	2.7	2.7	0.0%

Condos - Townhomes

By Square Feet	01-2025	01-2026	Change
1,500 Sq Ft and Below	2.3	2.1	-8.7%
1,501 to 2,000 Sq Ft	1.9	1.8	-5.3%
2,001 to 3,000 Sq Ft	2.3	2.0	-13.0%
3,001 to 4,000 Sq Ft	3.2	2.5	-21.9%
4,001 to 6,000 Sq Ft	4.4	4.2	-4.5%
6,001 Sq Ft and Above	9.1	7.6	-16.5%
All Square Footage	2.4	2.1	-12.5%

01-2025	01-2026	Change	01-2025	01-2026	Change
1.8	1.4	-22.2%	2.7	2.6	-3.7%
1.7	1.4	-17.6%	2.5	2.7	+8.0%
2.2	1.9	-13.6%	3.5	3.1	-11.4%
3.2	2.5	-21.9%	3.5	3.3	-5.7%
4.5	3.9	-13.3%	2.0	13.1	+555.0%
9.1	7.6	-16.5%	1.0	2.0	+100.0%
2.2	1.8	-18.2%	2.7	2.7	0.0%