

Housing Supply Overview

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

September 2026

Pending home sales fell 4.7% from a year earlier, with contract signings down in all four regions, according to the National Association of REALTORS®. Contract signings edged up 0.3% from the previous month. They are running roughly 30% below where they were in the years leading up to the pandemic, according to NAR Chief Economist Lawrence Yun. The 30-year fixed-rate mortgage moved above 7% in late September, up from an August average of 6.67%, according to Freddie Mac. For the 12-month period spanning October 2025 through September 2026, Pending Sales in the San Diego were down 0.2 percent overall. The price range with the largest gain in sales was the \$5,000,001 and Above range, where they increased 15.4 percent.

The overall Median Sales Price was up 1.1 percent to \$910,000. The property type with the largest price gain was the Single-Family Homes segment, where prices increased 2.9 percent to \$1,080,000. 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 81 days.

Market-wide, inventory levels were down 4.8 percent. However, the property type with the largest gain was the Condos - Townhomes segment, where they increased 5.8% percent. That amounts to 2.4 months supply for Single-Family homes and 4.0 months supply for Condos.

Quick Facts

+ 15.4%	+ 9.0%	+ 2.5%
Price Range With Strongest Pending Sales:	Home Size With Strongest Pending Sales:	Property Type With Strongest Pending Sales:
\$5,000,001 and Above	4,001 to 6,000 Sq Ft	Condos - Townhomes

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

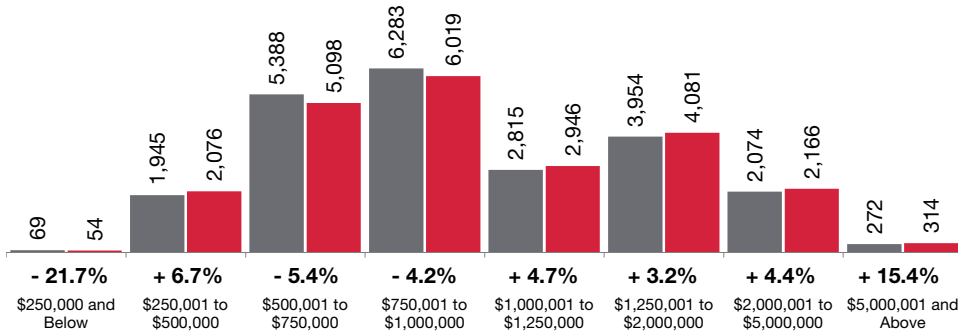
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Pending Sales

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

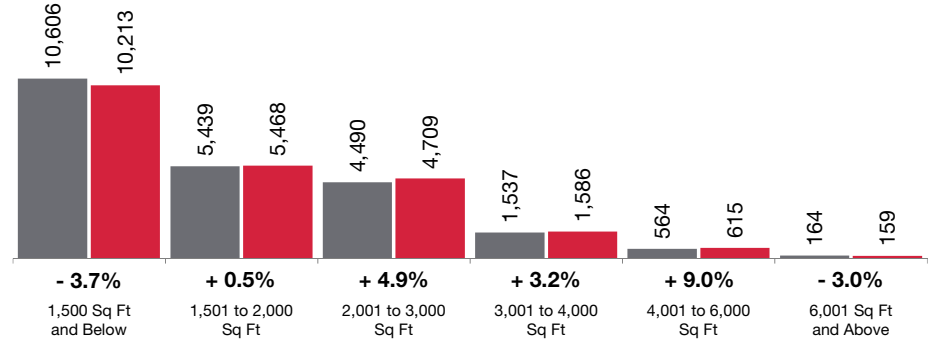
By Price Range

■ 09-2025 ■ 09-2026



By Square Feet

■ 09-2025 ■ 09-2026



All Properties

By Price Range	09-2025	09-2026	Change
\$250,000 and Below	69	54	-21.7%
\$250,001 to \$500,000	1,945	2,076	+6.7%
\$500,001 to \$750,000	5,388	5,098	-5.4%
\$750,001 to \$1,000,000	6,283	6,019	-4.2%
\$1,000,001 to \$1,250,000	2,815	2,946	+4.7%
\$1,250,001 to \$2,000,000	3,954	4,081	+3.2%
\$2,000,001 to \$5,000,000	2,074	2,166	+4.4%
\$5,000,001 and Above	272	314	+15.4%
All Price Ranges	22,800	22,754	-0.2%

Single-Family Homes

09-2025	09-2026	Change	09-2025	09-2026	Change
29	15	-48.3%	40	39	-2.5%
208	181	-13.0%	1,737	1,895	+9.1%
2,099	1,800	-14.2%	3,289	3,298	+0.3%
4,730	4,493	-5.0%	1,553	1,526	-1.7%
2,292	2,388	+4.2%	523	558	+6.7%
3,324	3,418	+2.8%	630	663	+5.2%
1,783	1,882	+5.6%	291	284	-2.4%
259	302	+16.6%	13	12	-7.7%
14,724	14,479	-1.7%	8,076	8,275	+2.5%

Condos - Townhomes

By Square Feet	09-2025	09-2026	Change
1,500 Sq Ft and Below	10,606	10,213	-3.7%
1,501 to 2,000 Sq Ft	5,439	5,468	+0.5%
2,001 to 3,000 Sq Ft	4,490	4,709	+4.9%
3,001 to 4,000 Sq Ft	1,537	1,586	+3.2%
4,001 to 6,000 Sq Ft	564	615	+9.0%
6,001 Sq Ft and Above	164	159	-3.0%
All Square Footage	22,800	22,754	-0.2%

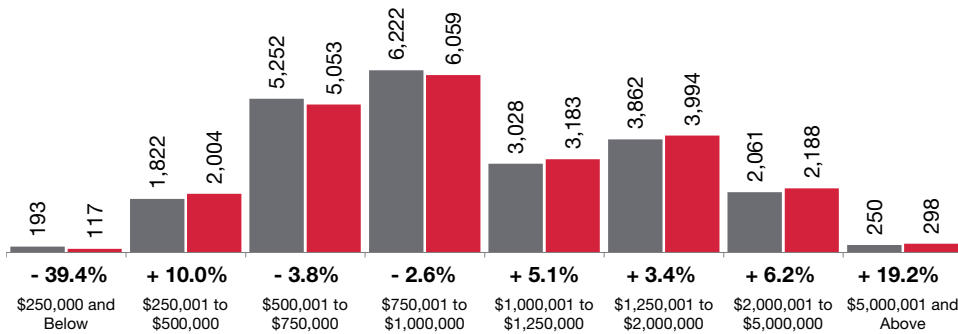
09-2025	09-2026	Change	09-2025	09-2026	Change
4,410	4,113	-6.7%	6,196	6,100	-1.5%
3,980	3,801	-4.5%	1,459	1,667	+14.3%
4,114	4,259	+3.5%	376	450	+19.7%
1,503	1,543	+2.7%	34	43	+26.5%
555	600	+8.1%	9	15	+66.7%
162	159	-1.9%	2	0	-100.0%
14,724	14,479	-1.7%	8,076	8,275	+2.5%

Closed Sales

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

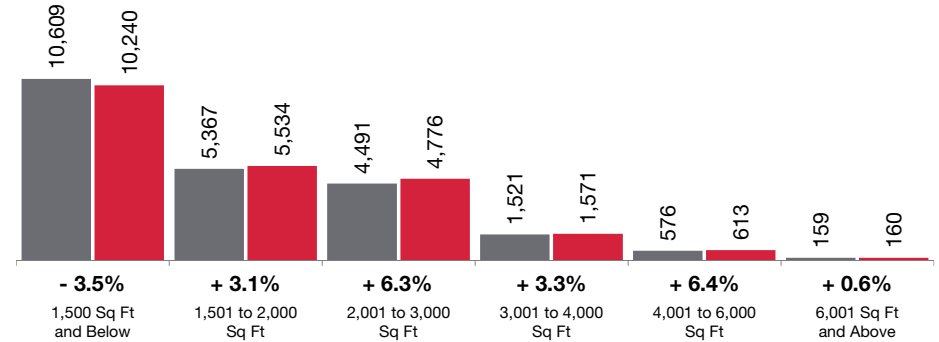
By Price Range

■ 09-2025 ■ 09-2026



By Square Feet

■ 09-2025 ■ 09-2026



All Properties

By Price Range	09-2025	09-2026	Change
\$250,000 and Below	193	117	- 39.4%
\$250,001 to \$500,000	1,822	2,004	+ 10.0%
\$500,001 to \$750,000	5,252	5,053	- 3.8%
\$750,001 to \$1,000,000	6,222	6,059	- 2.6%
\$1,000,001 to \$1,250,000	3,028	3,183	+ 5.1%
\$1,250,001 to \$2,000,000	3,862	3,994	+ 3.4%
\$2,000,001 to \$5,000,000	2,061	2,188	+ 6.2%
\$5,000,001 and Above	250	298	+ 19.2%
All Price Ranges	22,690	22,896	+ 0.9%

Single-Family Homes

09-2025	09-2026	Change
99	36	- 63.6%
194	196	+ 1.0%
1,921	1,686	- 12.2%
4,683	4,526	- 3.4%
2,482	2,611	+ 5.2%
3,251	3,367	+ 3.6%
1,781	1,903	+ 6.9%
242	290	+ 19.8%
14,653	14,615	- 0.3%

Condos - Townhomes

09-2025	09-2026	Change
94	81	- 13.8%
1,628	1,808	+ 11.1%
3,331	3,367	+ 1.1%
1,539	1,533	- 0.4%
546	572	+ 4.8%
611	627	+ 2.6%
280	285	+ 1.8%
8	8	0.0%
8,037	8,281	+ 3.0%

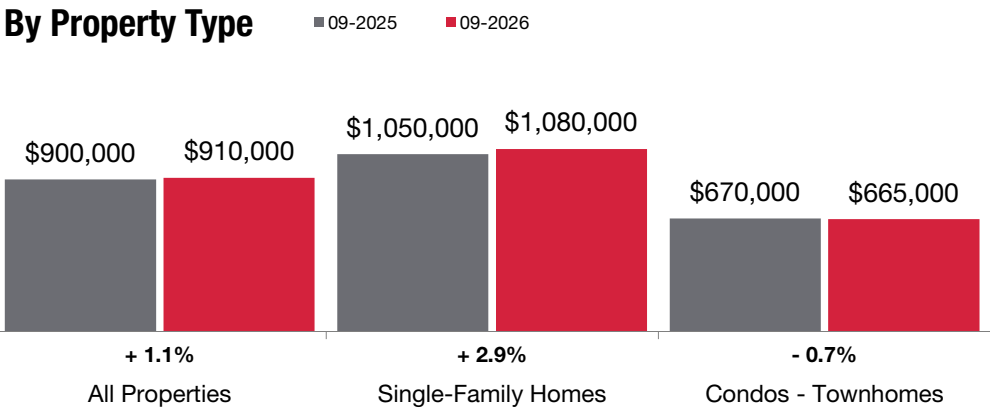
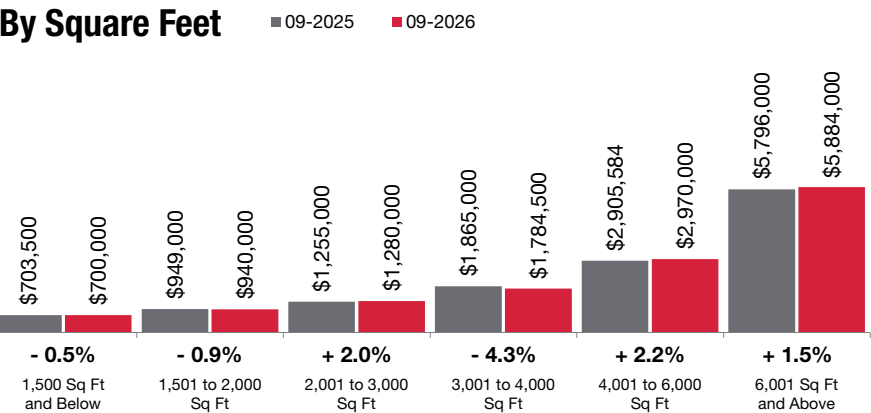
By Square Feet	09-2025	09-2026	Change
1,500 Sq Ft and Below	10,609	10,240	- 3.5%
1,501 to 2,000 Sq Ft	5,367	5,534	+ 3.1%
2,001 to 3,000 Sq Ft	4,491	4,776	+ 6.3%
3,001 to 4,000 Sq Ft	1,521	1,571	+ 3.3%
4,001 to 6,000 Sq Ft	576	613	+ 6.4%
6,001 Sq Ft and Above	159	160	+ 0.6%
All Square Footage	22,690	22,896	+ 0.9%

09-2025	09-2026	Change
4,437	4,108	- 7.4%
3,920	3,886	- 0.9%
4,084	4,327	+ 6.0%
1,487	1,529	+ 2.8%
568	602	+ 6.0%
157	160	+ 1.9%
14,653	14,615	- 0.3%

09-2025	09-2026	Change
6,172	6,132	- 0.6%
1,447	1,648	+ 13.9%
374	449	+ 20.1%
34	42	+ 23.5%
8	10	+ 25.0%
2	0	- 100.0%
8,037	8,281	+ 3.0%

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	09-2025	09-2026	Change
1,500 Sq Ft and Below	\$703,500	\$700,000	- 0.5%
1,501 to 2,000 Sq Ft	\$949,000	\$940,000	- 0.9%
2,001 to 3,000 Sq Ft	\$1,255,000	\$1,280,000	+ 2.0%
3,001 to 4,000 Sq Ft	\$1,865,000	\$1,784,500	- 4.3%
4,001 to 6,000 Sq Ft	\$2,905,584	\$2,970,000	+ 2.2%
6,001 Sq Ft and Above	\$5,796,000	\$5,884,000	+ 1.5%
All Square Footage	\$900,000	\$910,000	+ 1.1%

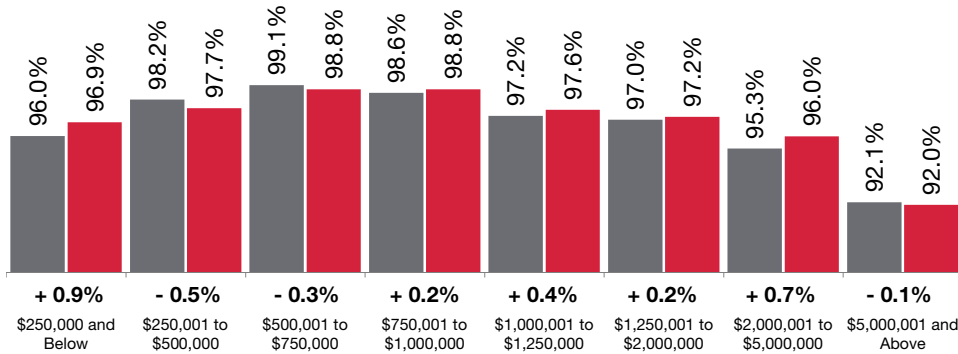
Single-Family Homes			Condos - Townhomes		
09-2025	09-2026	Change	09-2025	09-2026	Change
\$800,000	\$810,000	+ 1.3%	\$605,000	\$595,000	- 1.7%
\$955,000	\$961,000	+ 0.6%	\$900,000	\$860,500	- 4.4%
\$1,249,000	\$1,260,000	+ 0.9%	\$1,487,500	\$1,525,000	+ 2.5%
\$1,860,000	\$1,772,500	- 4.7%	\$2,527,500	\$2,187,500	- 13.5%
\$2,905,584	\$2,960,000	+ 1.9%	\$2,799,500	\$3,442,500	+ 23.0%
\$5,796,000	\$5,884,000	+ 1.5%	\$3,690,550	--	--
\$1,050,000	\$1,080,000	+ 2.9%	\$670,000	\$665,000	- 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.**

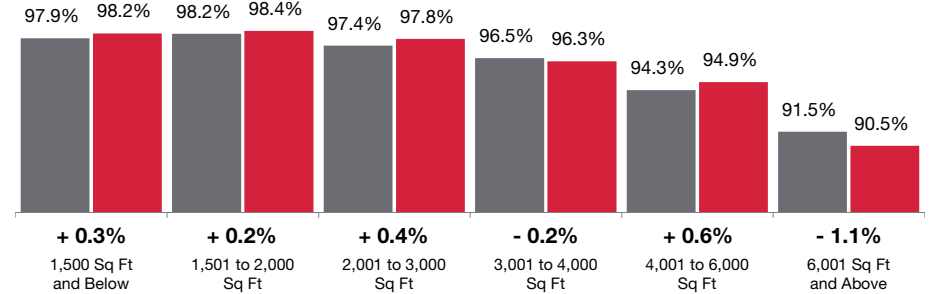
By Price Range

■ 09-2025 ■ 09-2026



By Square Feet

■ 09-2025 ■ 09-2026



All Properties

By Price Range	09-2025	09-2026	Change
\$250,000 and Below	96.0%	96.9%	+ 0.9%
\$250,001 to \$500,000	98.2%	97.7%	- 0.5%
\$500,001 to \$750,000	99.1%	98.8%	- 0.3%
\$750,001 to \$1,000,000	98.6%	98.8%	+ 0.2%
\$1,000,001 to \$1,250,000	97.2%	97.6%	+ 0.4%
\$1,250,001 to \$2,000,000	97.0%	97.2%	+ 0.2%
\$2,000,001 to \$5,000,000	95.3%	96.0%	+ 0.7%
\$5,000,001 and Above	92.1%	92.0%	- 0.1%
All Price Ranges	97.8%	97.9%	+ 0.1%

Single-Family Homes

09-2025	09-2026	Change
93.3%	92.6%	- 0.8%
99.2%	98.8%	- 0.4%
100.3%	100.5%	+ 0.2%
98.9%	99.3%	+ 0.4%
97.4%	97.9%	+ 0.5%
97.1%	97.4%	+ 0.3%
95.4%	96.2%	+ 0.8%
92.0%	92.0%	0.0%
97.8%	98.2%	+ 0.4%

Condos - Townhomes

09-2025	09-2026	Change
98.8%	98.2%	- 0.6%
98.1%	97.6%	- 0.5%
98.3%	97.9%	- 0.4%
97.7%	97.3%	- 0.4%
96.7%	96.3%	- 0.4%
96.5%	96.0%	- 0.5%
94.7%	95.2%	+ 0.5%
95.0%	92.7%	- 2.4%
97.7%	97.4%	- 0.3%

By Square Feet

09-2025	09-2026	Change
97.9%	98.2%	+ 0.3%
98.2%	98.4%	+ 0.2%
97.4%	97.8%	+ 0.4%
96.5%	96.3%	- 0.2%
94.3%	94.9%	+ 0.6%
91.5%	90.5%	- 1.1%
97.8%	97.9%	+ 0.1%

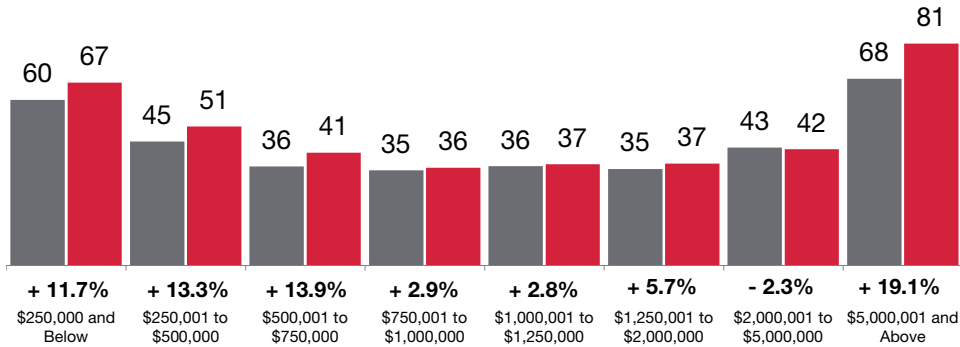
09-2025	09-2026	Change
99.0%	99.3%	+ 0.3%
98.3%	98.8%	+ 0.5%
97.4%	97.9%	+ 0.5%
96.5%	96.3%	- 0.2%
94.4%	94.9%	+ 0.5%
91.5%	90.5%	- 1.1%
97.8%	97.5%	- 0.3%
97.6%	97.3%	- 0.3%
97.3%	96.5%	- 0.8%
95.0%	94.4%	- 0.6%
90.6%	93.4%	+ 3.1%
93.4%	--	--
97.7%	97.4%	- 0.3%

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.

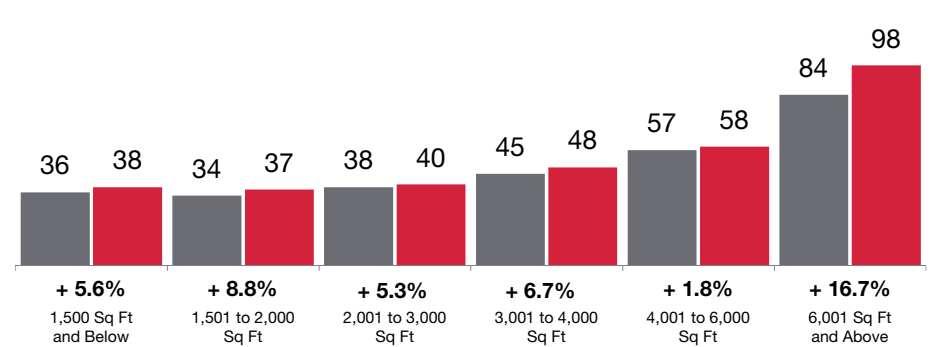
By Price Range

■ 09-2025 ■ 09-2026



By Square Feet

■ 09-2025 ■ 09-2026



All Properties

By Price Range	09-2025	09-2026	Change
\$250,000 and Below	60	67	+ 11.7%
\$250,001 to \$500,000	45	51	+ 13.3%
\$500,001 to \$750,000	36	41	+ 13.9%
\$750,001 to \$1,000,000	35	36	+ 2.9%
\$1,000,001 to \$1,250,000	36	37	+ 2.8%
\$1,250,001 to \$2,000,000	35	37	+ 5.7%
\$2,000,001 to \$5,000,000	43	42	- 2.3%
\$5,000,001 and Above	68	81	+ 19.1%
All Price Ranges	37	40	+ 8.1%

Single-Family Homes

09-2025	09-2026	Change
53	80	+ 50.9%
54	60	+ 11.1%
33	38	+ 15.2%
33	34	+ 3.0%
36	36	0.0%
35	36	+ 2.9%
42	41	- 2.4%
69	81	+ 17.4%
36	37	+ 2.8%

Condos - Townhomes

09-2025	09-2026	Change
68	61	- 10.3%
44	50	+ 13.6%
38	43	+ 13.2%
38	41	+ 7.9%
38	40	+ 5.3%
37	44	+ 18.9%
50	54	+ 8.0%
45	74	+ 64.4%
40	44	+ 10.0%

By Square Feet

09-2025	09-2026	Change
36	38	+ 5.6%
34	37	+ 8.8%
38	40	+ 5.3%
45	48	+ 6.7%
57	58	+ 1.8%
84	98	+ 16.7%
37	40	+ 8.1%

09-2025	09-2026	Change
31	31	0.0%
32	33	+ 3.1%
38	39	+ 2.6%
45	48	+ 6.7%
56	58	+ 3.6%
84	98	+ 16.7%
36	37	+ 2.8%

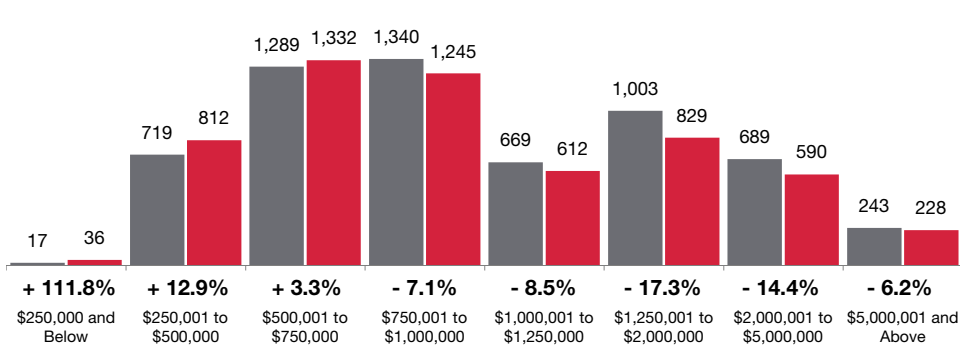
09-2025	09-2026	Change
39	43	+ 10.3%
41	47	+ 14.6%
41	49	+ 19.5%
56	45	- 19.6%
69	63	- 8.7%
91	--	--
40	44	+ 10.0%

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.

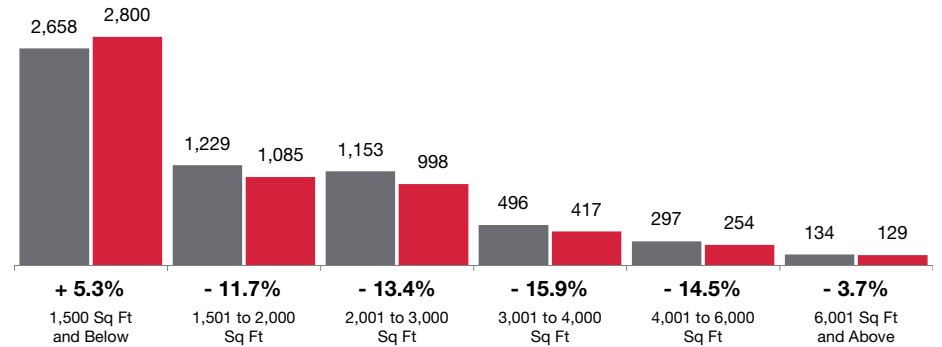
By Price Range

■ 09-2025 ■ 09-2026



By Square Feet

■ 09-2025 ■ 09-2026



All Properties

By Price Range	09-2025	09-2026	Change
\$250,000 and Below	17	36	+ 111.8%
\$250,001 to \$500,000	719	812	+ 12.9%
\$500,001 to \$750,000	1,289	1,332	+ 3.3%
\$750,001 to \$1,000,000	1,340	1,245	- 7.1%
\$1,000,001 to \$1,250,000	669	612	- 8.5%
\$1,250,001 to \$2,000,000	1,003	829	- 17.3%
\$2,000,001 to \$5,000,000	689	590	- 14.4%
\$5,000,001 and Above	243	228	- 6.2%
All Price Ranges	5,969	5,684	- 4.8%

Single-Family Homes

09-2025	09-2026	Change	09-2025	09-2026	Change
4	8	+ 100.0%	13	28	+ 115.4%
57	50	- 12.3%	662	762	+ 15.1%
326	304	- 6.7%	963	1,028	+ 6.7%
910	817	- 10.2%	430	428	- 0.5%
511	448	- 12.3%	158	164	+ 3.8%
784	626	- 20.2%	219	203	- 7.3%
561	483	- 13.9%	128	107	- 16.4%
233	214	- 8.2%	10	14	+ 40.0%
3,386	2,950	- 12.9%	2,583	2,734	+ 5.8%

Condos - Townhomes

By Square Feet	09-2025	09-2026	Change
1,500 Sq Ft and Below	2,658	2,800	+ 5.3%
1,501 to 2,000 Sq Ft	1,229	1,085	- 11.7%
2,001 to 3,000 Sq Ft	1,153	998	- 13.4%
3,001 to 4,000 Sq Ft	496	417	- 15.9%
4,001 to 6,000 Sq Ft	297	254	- 14.5%
6,001 Sq Ft and Above	134	129	- 3.7%
All Square Footage	5,969	5,684	- 4.8%

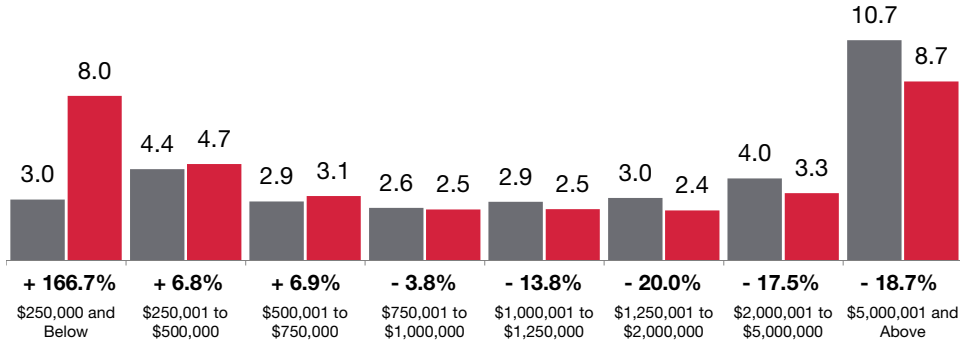
09-2025	09-2026	Change	09-2025	09-2026	Change
750	704	- 6.1%	1,908	2,096	+ 9.9%
749	600	- 19.9%	480	485	+ 1.0%
992	875	- 11.8%	161	123	- 23.6%
479	400	- 16.5%	17	17	0.0%
281	241	- 14.2%	16	13	- 18.8%
133	129	- 3.0%	1	0	- 100.0%
3,386	2,950	- 12.9%	2,583	2,734	+ 5.8%

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.

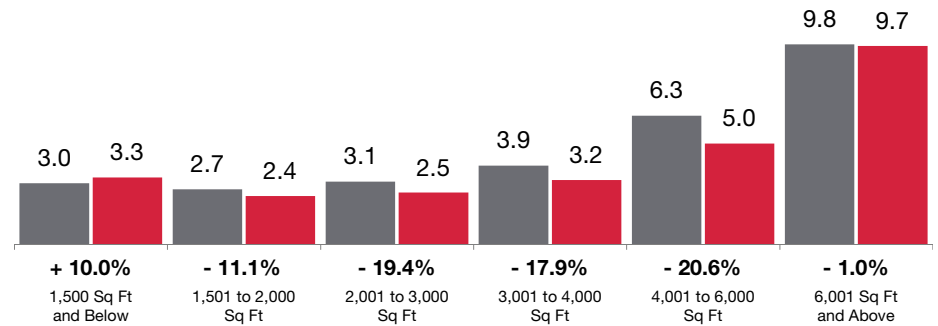
By Price Range

■ 09-2025 ■ 09-2026



By Square Feet

■ 09-2025 ■ 09-2026



All Properties

By Price Range	09-2025	09-2026	Change
\$250,000 and Below	3.0	8.0	+ 166.7%
\$250,001 to \$500,000	4.4	4.7	+ 6.8%
\$500,001 to \$750,000	2.9	3.1	+ 6.9%
\$750,001 to \$1,000,000	2.6	2.5	- 3.8%
\$1,000,001 to \$1,250,000	2.9	2.5	- 13.8%
\$1,250,001 to \$2,000,000	3.0	2.4	- 20.0%
\$2,000,001 to \$5,000,000	4.0	3.3	- 17.5%
\$5,000,001 and Above	10.7	8.7	- 18.7%
All Price Ranges	3.1	3.0	- 3.2%

Single-Family Homes

09-2025	09-2026	Change	09-2025	09-2026	Change
1.5	4.3	+ 186.7%	3.9	8.6	+ 120.5%
3.3	3.3	0.0%	4.6	4.8	+ 4.3%
1.9	2.0	+ 5.3%	3.5	3.7	+ 5.7%
2.3	2.2	- 4.3%	3.3	3.4	+ 3.0%
2.7	2.3	- 14.8%	3.6	3.5	- 2.8%
2.8	2.2	- 21.4%	4.2	3.7	- 11.9%
3.8	3.1	- 18.4%	5.3	4.5	- 15.1%
10.8	8.5	- 21.3%	6.9	8.2	+ 18.8%
2.8	2.4	- 14.3%	3.8	4.0	+ 5.3%

Condos - Townhomes

By Square Feet	09-2025	09-2026	Change
1,500 Sq Ft and Below	3.0	3.3	+ 10.0%
1,501 to 2,000 Sq Ft	2.7	2.4	- 11.1%
2,001 to 3,000 Sq Ft	3.1	2.5	- 19.4%
3,001 to 4,000 Sq Ft	3.9	3.2	- 17.9%
4,001 to 6,000 Sq Ft	6.3	5.0	- 20.6%
6,001 Sq Ft and Above	9.8	9.7	- 1.0%
All Square Footage	3.1	3.0	- 3.2%

09-2025	09-2026	Change	09-2025	09-2026	Change
2.0	2.1	+ 5.0%	3.7	4.1	+ 10.8%
2.3	1.9	- 17.4%	3.9	3.5	- 10.3%
2.9	2.5	- 13.8%	5.1	3.3	- 35.3%
3.8	3.1	- 18.4%	4.5	4.7	+ 4.4%
6.1	4.8	- 21.3%	12.4	7.8	- 37.1%
9.9	9.7	- 2.0%	1.0	--	--
2.8	2.4	- 14.3%	3.8	4.0	+ 5.3%