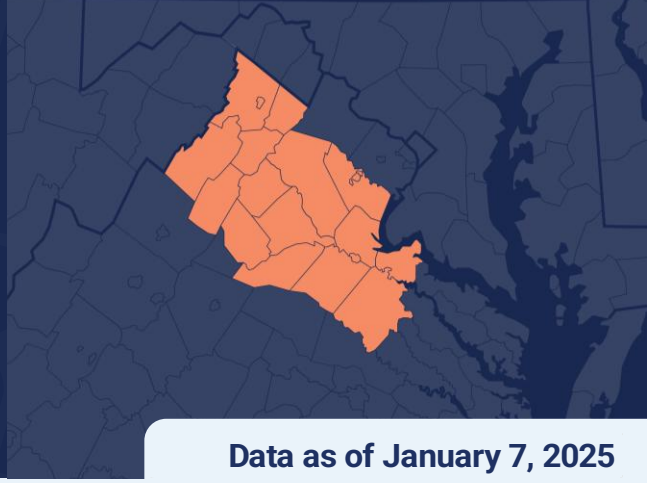
North Central Virginia

December 2025 Housing Market Report

Prepared by Bright Research



Data as of January 7, 2025

Key Market Statistics	Dec 2025	Dec 2024	Change	YTD 2025	YTD 2024	Change
Closed Sales	1,291	1,271	+1.6%	16,458	16,929	-2.8%
Median Sold Price	$489,950	$489,945	+0.0%	$499,900	$485,000	+3.1%
Median Days on Market	26 days	18 days	+8 days	15 days	10 days	+5 days
New Pending Sales	991	1,029	-3.7%	16,665	16,962	-1.8%
New Listings	876	789	+11.0%	22,400	20,960	+6.9%
Active Listings	2,669	1,875	+42.3%	2,669	1,875	+42.3%
Months of Supply	1.95	1.33	+0.62 mos.	1.95	1.33	+0.62 mos.
Showings	16,006	14,153	+13.1%	287,163	281,785	+1.9%

Housing Market Trends

North Central Virginia sellers reemerge to close the year. Seller activity in the North Central Virginia market has been better than 2024, with new listings up 1.0% year-over-year in December and increasing 6.9% for 2025 as a whole. New listings have outpaced sales, leading to significant inventory gains in the region.

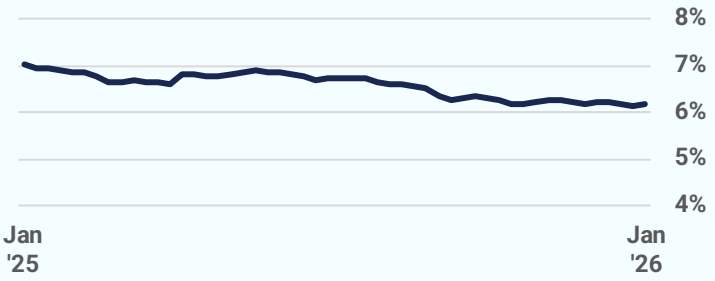
There were 2,669 active listings on the market at the end of December 2025, up a significant 42.3% compared to a year earlier. Condo inventory has surpassed where it was in 2019 and townhome supply is nearing those levels. Detached single-family homes may feel a bit more restrictive , at 67% of the level they were pre-pandemic.

Buyers in the North Central Virginia market were more hesitant in 2025. Overall closed sales ended the year 2.8% lower than 2024. Prince William County was particularly impacted with sales dropping 5.6% in 2025 compared to 2024.

Market Outlook

Federal government layoffs affected the North Central Virginia housing market in 2025. Affordability challenges continued to weigh on prospective buyers as well. Sales should improve in the new year as more supply and lower mortgage rates entice some buyers to make a purchase. Expect more listing activity in 2026 as the market moves towards more balance.

Weekly Avg. Mortgage Rate 30-yr fixed rate



Source: Freddie Mac

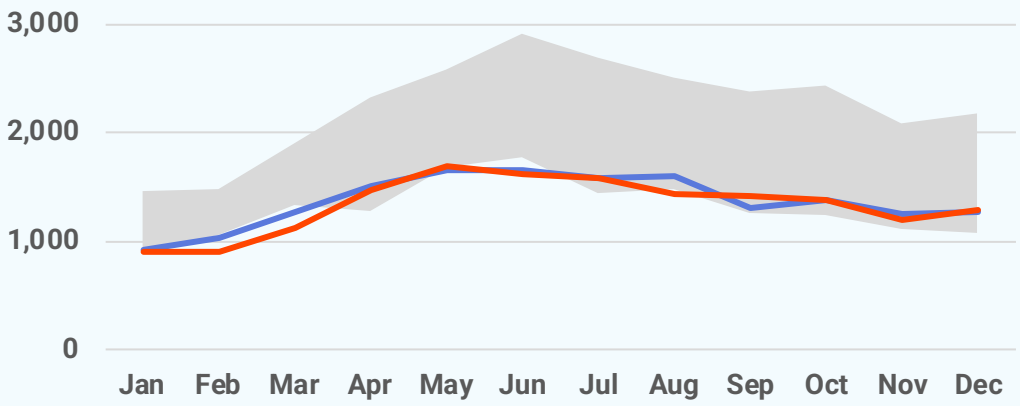
Closed Sales

2025 | 2024 | 2020-2023 Range

1,291
December 2025

+1.6%
Dec '25 vs. Dec '24
(Dec '24: 1,271)

+8.6%
Dec '25 vs. Nov '25
(Nov '25: 1,189)



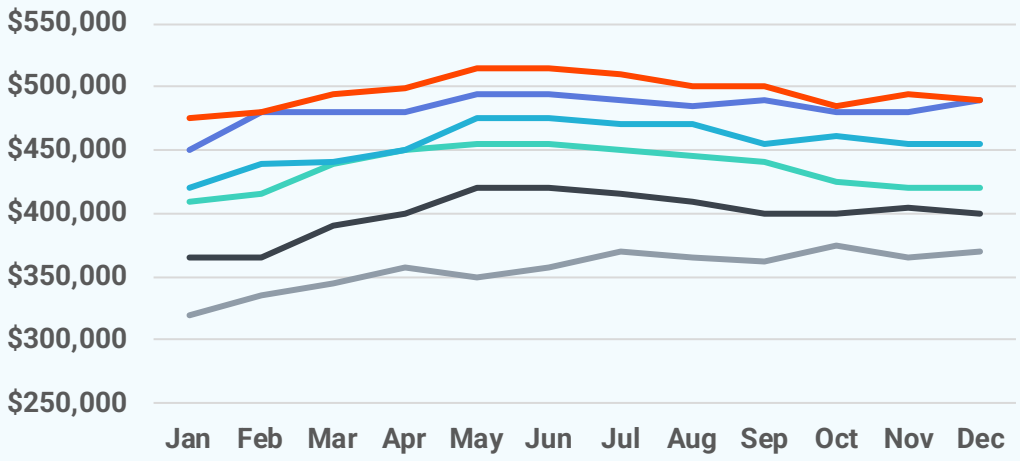
Median Sold Price

2025 | 2024 | 2023 | 2022 | 2021 | 2020

$489,950
December 2025

+0.0%
Dec '25 vs. Dec '24
(Dec '24: $489,945)

-1.0%
Dec '25 vs. Nov '25
(Nov '25: $495,000)

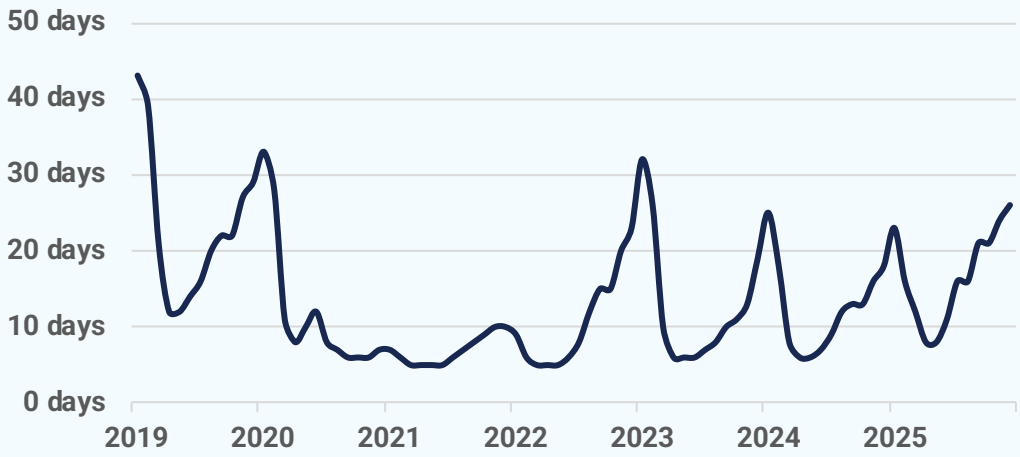


Median Days on Market

26 days
December 2025

+8 days
Dec '25 vs. Dec '24
(Dec '24: 18 days)

+2 days
Dec '25 vs. Nov '25
(Nov '25: 24 days)



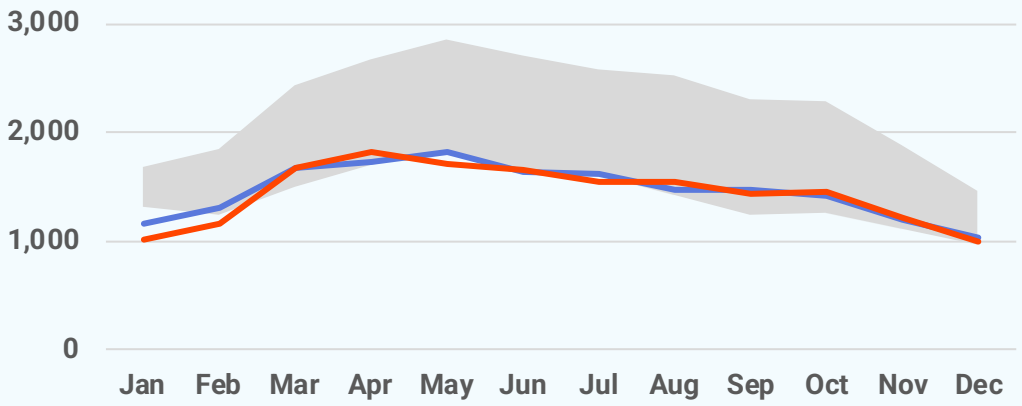
New Pending Sales

2025 | 2024 | 2020-2023 Range

991
December 2025

-3.7%
Dec '25 vs. Dec '24
(Dec '24: 1,029)

-19.0%
Dec '25 vs. Nov '25
(Nov '25: 1,224)



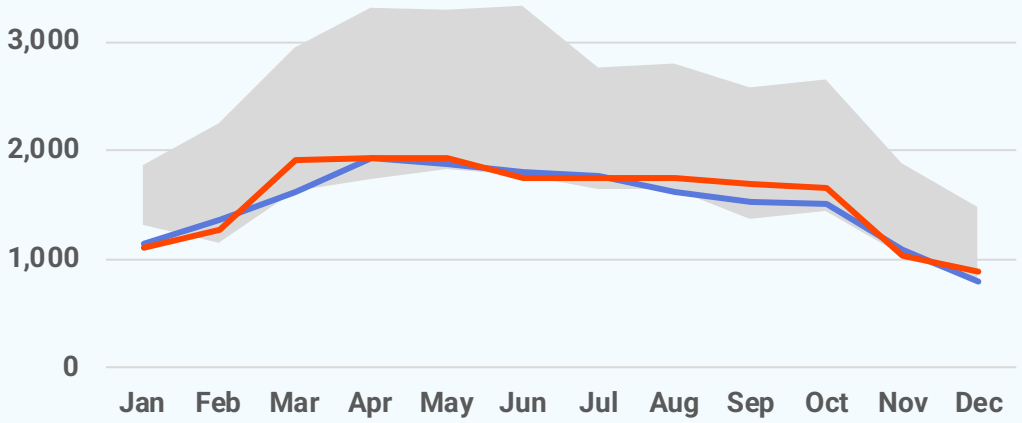
New Listings

2025 | 2024 | 2020-2023 Range

876
December 2025

+11.0%
Dec '25 vs. Dec '24
(Dec '24: 789)

-15.5%
Dec '25 vs. Nov '25
(Nov '25: 1,037)



Active Listings

2,669
December 2025

+42.3%
Dec '25 vs. Dec '24
(Dec '24: 1,875)

-12.4%
Dec '25 vs. Nov '25
(Nov '25: 3,048)



Local Markets	Closed Sales		Median Sales Price		Median Days on Market	
	Dec '25	vs. Dec '24	Dec '25	vs. Dec '24	Dec '25	vs. Dec '24
North Central VA	1,291	+1.6%	$489,950	+0.0%	26 days	+8 days
Caroline County, VA	31	+0.0%	$325,000	-17.7%	26 days	+5 days
Clarke County, VA	12	-47.8%	$477,500	-0.5%	19 days	-23 days
Culpeper County, VA	64	+64.1%	$497,450	-10.5%	40 days	+29 days
Fauquier County, VA	82	+15.5%	$680,584	+8.0%	26 days	+14 days
Frederick County, VA	99	-19.5%	$405,000	-9.9%	26 days	-1 day
Fredericksburg City, VA	29	+38.1%	$440,000	-1.1%	26 days	+7 days
King George County, VA	20	-23.1%	$480,000	+4.3%	53 days	+43 days
Madison County, VA	11	-8.3%	$377,500	-20.1%	11 days	-11 days
Manassas City, VA	39	-4.9%	$450,900	-2.6%	17 days	+9 days
Manassas Park City, VA	10	-9.1%	$482,172	-0.6%	43 days	+28 days
Orange County, VA	71	+65.1%	$411,325	+0.3%	28 days	-10 days
Page County, VA	34	+183.3%	$299,900	+15.3%	8 days	-22 days
Prince William County, VA	376	-11.9%	$584,995	+3.5%	25 days	+11 days
Rappahannock County, VA	6	-14.3%	$767,500	+42.1%	19 days	+5 days
Shenandoah County, VA	48	-9.4%	$347,000	+8.8%	21 days	-6 days
Spotsylvania County, VA	153	+15.9%	$449,900	+2.3%	26 days	+8 days
Stafford County, VA	143	+8.3%	$545,000	+10.1%	30 days	+10 days
Warren County, VA	39	-7.1%	$372,000	-2.2%	30 days	-7 days
Winchester City, VA	24	-4.0%	$403,145	+8.5%	32 days	-10 days

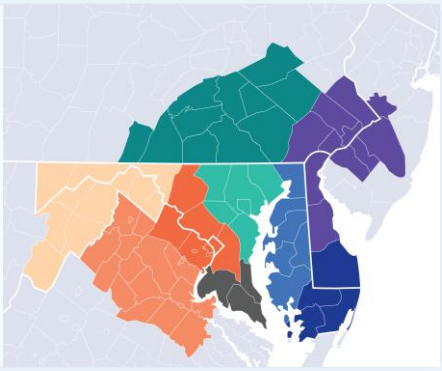
Local Markets	New Pending Sales		New Listings		Showings	
	Dec '25	vs. Dec '24	Dec '25	vs. Dec '24	Dec '25	vs. Dec '24
North Central VA	991	-3.7%	876	+11.0%	16,006	+13.1%
Caroline County, VA	21	-34.4%	24	-51.0%	226	-4.2%
Clarke County, VA	8	+0.0%	8	+33.3%	131	+36.5%
Culpeper County, VA	36	+5.9%	25	-13.8%	410	+2.8%
Fauquier County, VA	52	-8.8%	51	+13.3%	609	-9.6%
Frederick County, VA	90	-5.3%	90	+13.9%	1,167	+11.6%
Fredericksburg City, VA	14	+27.3%	21	+162.5%	232	+4.0%
King George County, VA	27	-3.6%	24	+41.2%	293	+19.6%
Madison County, VA	7	-30.0%	6	-50.0%	56	+7.7%
Manassas City, VA	25	-19.4%	21	+5.0%	424	+5.5%
Manassas Park City, VA	13	+44.4%	4	-55.6%	246	+6.0%
Orange County, VA	48	-29.4%	59	+0.0%	462	+41.7%
Page County, VA	17	+13.3%	24	+200.0%	157	-6.0%
Prince William County, VA	325	+20.4%	228	+19.4%	6,127	+18.4%
Rappahannock County, VA	5	-37.5%	4	+33.3%	76	-8.4%
Shenandoah County, VA	37	-11.9%	29	-19.4%	398	+14.7%
Spotsylvania County, VA	111	-9.8%	107	+37.2%	1,977	+15.2%
Stafford County, VA	100	-16.7%	96	-5.0%	2,014	+9.4%
Warren County, VA	40	+8.1%	36	+56.5%	677	+9.4%
Winchester City, VA	15	-51.6%	19	+18.8%	324	+18.7%

Local Markets

	Active Listings		Months of Supply	
	Dec '25	vs. Dec '24	Dec '25	vs. Dec '24
North Central VA	2,669	+42.3%	1.95	+0.62 months
Caroline County, VA	70	-22.2%	1.89	-0.42 months
Clarke County, VA	38	+111.1%	2.71	+1.51 months
Culpeper County, VA	145	+55.9%	2.84	+1.02 months
Fauquier County, VA	146	+23.7%	1.87	+0.32 months
Frederick County, VA	266	+20.4%	2.05	+0.34 months
Fredericksburg City, VA	50	+0.0%	2.27	+0.1 months
King George County, VA	71	+34.0%	2.84	+1.07 months
Madison County, VA	31	+19.2%	2.82	+0.46 months
Manassas City, VA	35	+29.6%	1.00	+0.31 months
Manassas Park City, VA	19	+111.1%	1.12	+0.59 months
Orange County, VA	310	+119.9%	4.92	+2.45 months
Page County, VA	83	+69.4%	3.95	+1.62 months
Prince William County, VA	460	+66.7%	1.10	+0.47 months
Rappahannock County, VA	31	+3.3%	5.17	+0.17 months
Shenandoah County, VA	106	+29.3%	2.12	+0.48 months
Spotsylvania County, VA	323	+35.1%	2.10	+0.56 months
Stafford County, VA	315	+40.6%	1.98	+0.59 months
Warren County, VA	106	+12.8%	2.26	+0.45 months
Winchester City, VA	64	+82.9%	2.37	+1.16 months

Local Market Map

- MD/WV Panhandle
- North Central Virginia
- Washington D.C., Metro Area
- Central Pennsylvania
- Baltimore Metro Area
- Southern Maryland
- Maryland Eastern Shore
- Philadelphia Metro Area
- Del/Mar Coastal



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Please contact **Christy Reap, Media Relations Director** with interview or information requests:

- (202) 309-9362
- christy.reap@brightmls.com

North Central Virginia

December 2025 Detached Single-Family Home Report

Prepared by Bright Research

Data as of January 7, 2025

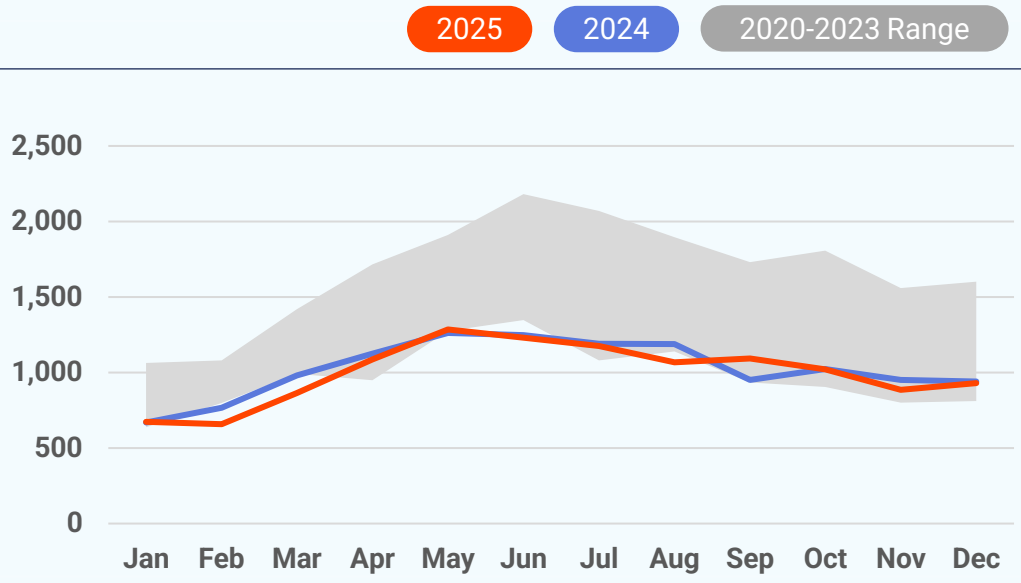
Key Market Statistics	Dec 2025	Dec 2024	Change
Closed Sales	930	941	-1.2%
Median Sold Price	$530,000	$525,000	+1.0%
Median Days on Market	28 days	20 days	+8 days
New Pending Sales	709	760	-6.7%
New Listings	647	610	+6.1%
Active Listings	2,150	1,547	+39.0%
Months of Supply	2.11	1.47	+0.64 mos.

Closed Sales

930
December 2025

-1.2%
Dec '25 vs. Dec '24
(Dec '24: 941)

+5.0%
Dec '25 vs. Nov '25
(Nov '25: 886)



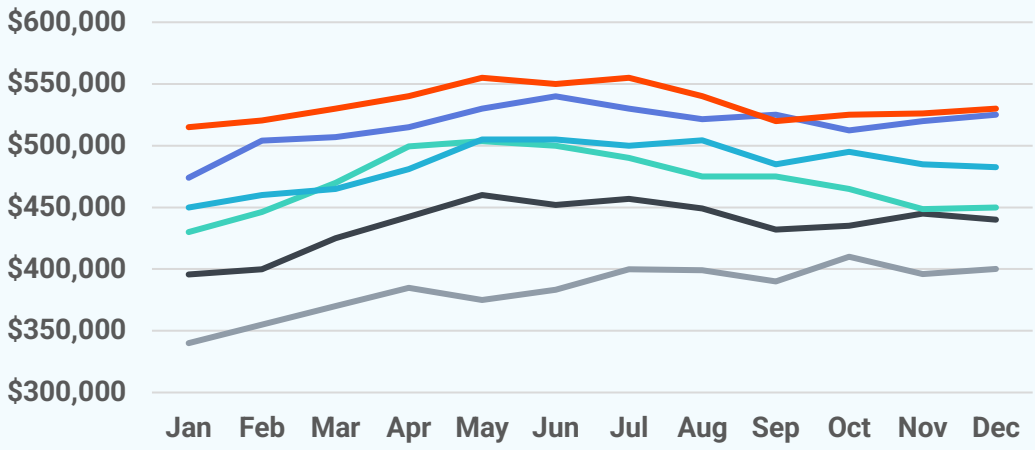
Median Sold Price

2025 2024 2023 2022 2021 2020

$530,000
December 2025

+1.0%
Dec '25 vs. Dec '24
(Dec '24: $525,000)

+0.8%
Dec '25 vs. Nov '25
(Nov '25: $526,000)

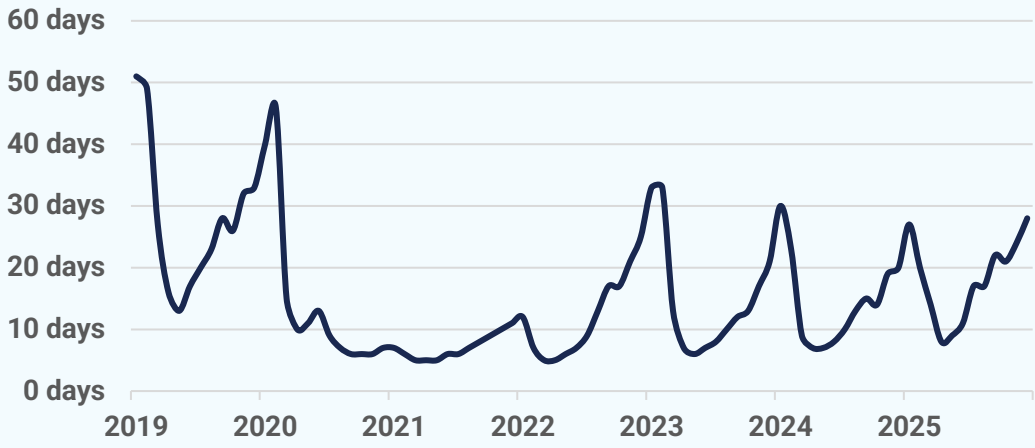


Median Days on Market

28 days
December 2025

+8 days
Dec '25 vs. Dec '24
(Dec '24: 20 days)

+4 days
Dec '25 vs. Nov '25
(Nov '25: 24 days)



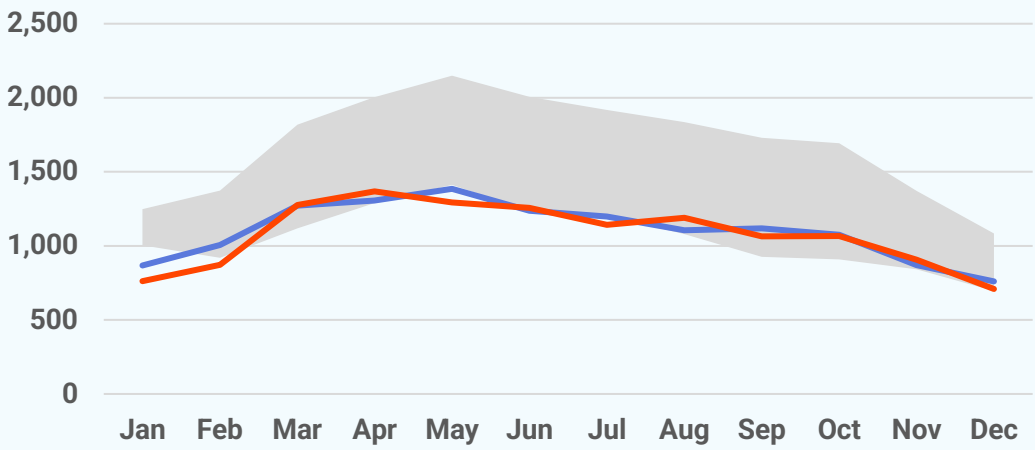
New Pending Sales

2025 2024 2020-2023 Range

709
December 2025

-6.7%
Dec '25 vs. Dec '24
(Dec '24: 760)

-21.8%
Dec '25 vs. Nov '25
(Nov '25: 907)



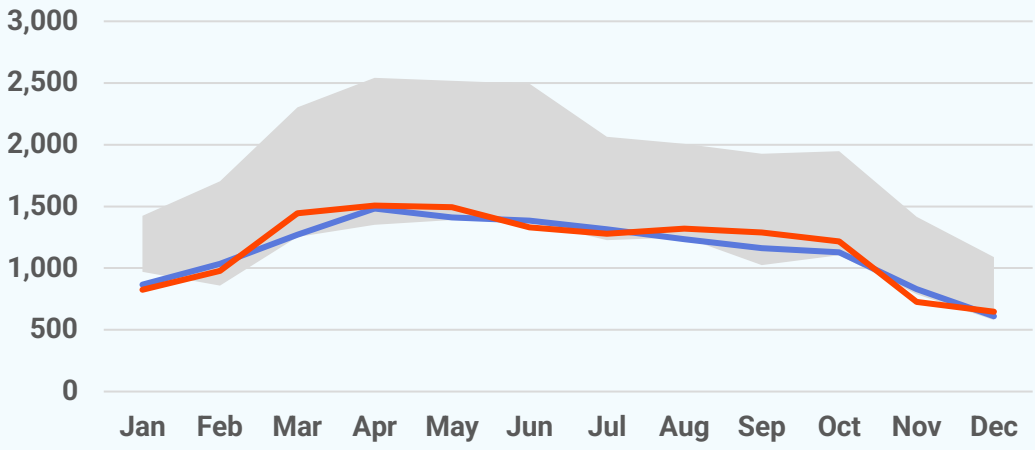
New Listings

2025 | 2024 | 2020-2023 Range

647
December 2025

+6.1%
Dec '25 vs. Dec '24
(Dec '24: 610)

-10.9%
Dec '25 vs. Nov '25
(Nov '25: 726)



Active Listings

2,150
December 2025

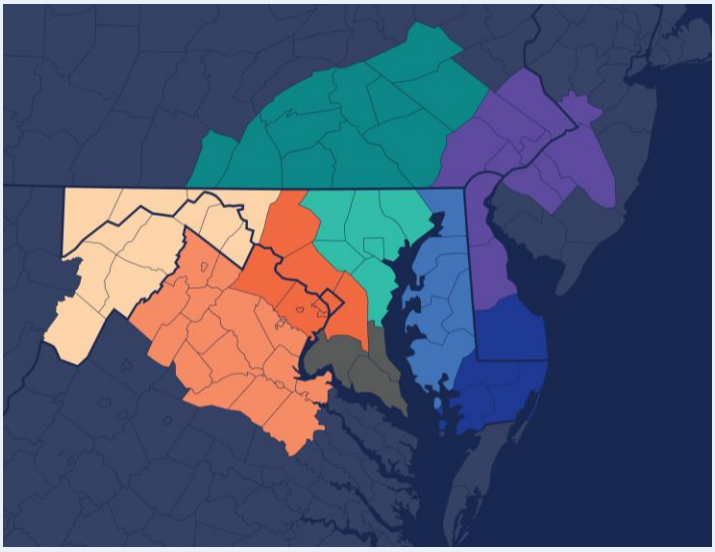
+39.0%
Dec '25 vs. Dec '24
(Dec '24: 1,547)

-10.9%
Dec '25 vs. Nov '25
(Nov '25: 2,412)



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North Central Virginia

December 2025 Attached/Townhomes Report

Prepared by Bright Research

Data as of January 7, 2025

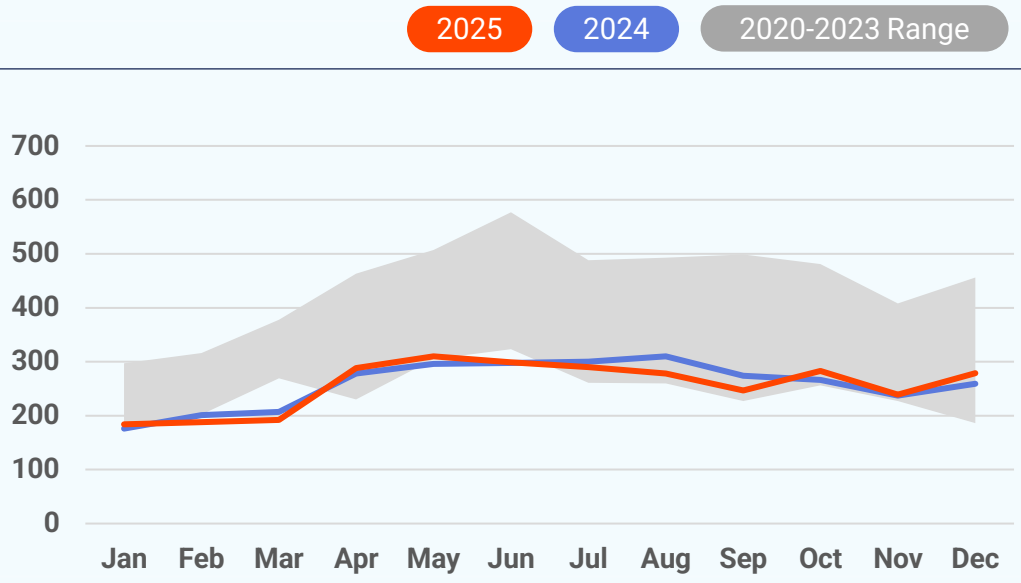
Key Market Statistics	Dec 2025	Dec 2024	Change
Closed Sales	279	259	+7.7%
Median Sold Price	$420,000	$425,000	-1.2%
Median Days on Market	18 days	16 days	+2 days
New Pending Sales	206	208	-1.0%
New Listings	166	123	+35.0%
Active Listings	334	227	+47.1%
Months of Supply	1.26	0.85	+0.41 mos.

Closed Sales

279
December 2025

+7.7%
Dec '25 vs. Dec '24
(Dec '24: 259)

+16.7%
Dec '25 vs. Nov '25
(Nov '25: 239)



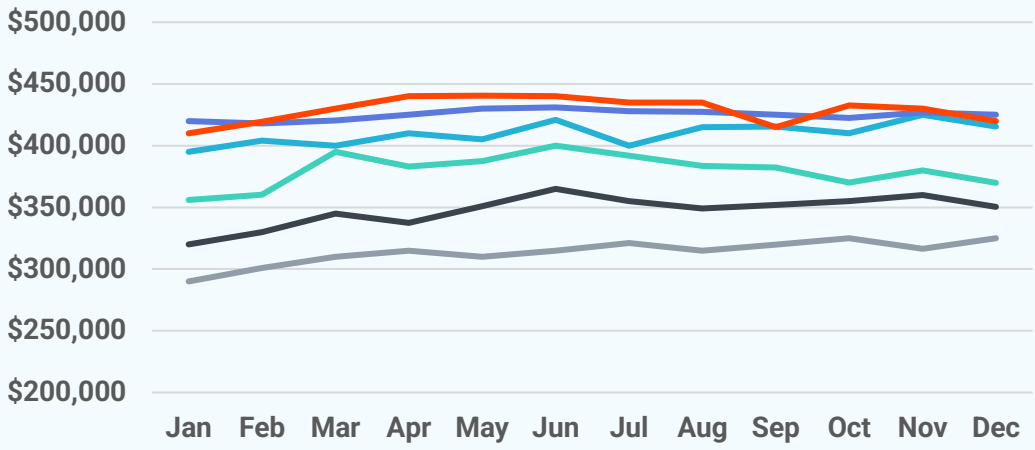
Median Sold Price

2025 2024 2023 2022 2021 2020

$420,000
December 2025

-1.2%
Dec '25 vs. Dec '24
(Dec '24: $425,000)

-2.3%
Dec '25 vs. Nov '25
(Nov '25: $430,000)



Median Days on Market

18 days
December 2025

+2 days
Dec '25 vs. Dec '24
(Dec '24: 16 days)

-1 day
Dec '25 vs. Nov '25
(Nov '25: 19 days)



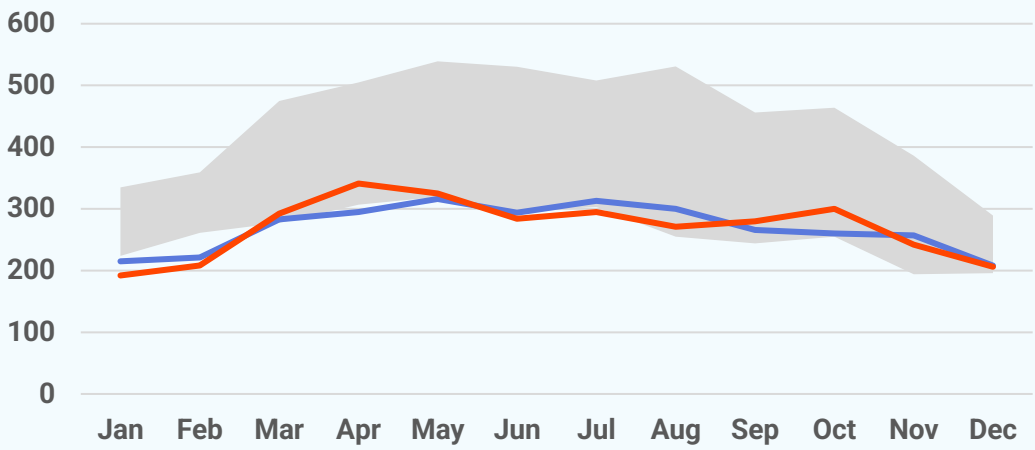
New Pending Sales

2025 2024 2020-2023 Range

206
December 2025

-1.0%
Dec '25 vs. Dec '24
(Dec '24: 208)

-14.9%
Dec '25 vs. Nov '25
(Nov '25: 242)



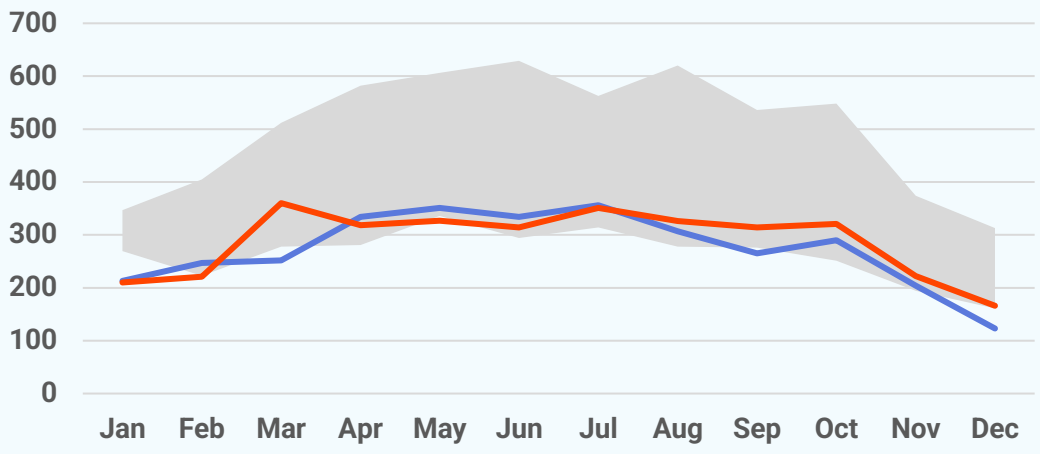
New Listings

2025 | 2024 | 2020-2023 Range

166
December 2025

+35.0%
Dec '25 vs. Dec '24
(Dec '24: 123)

-25.2%
Dec '25 vs. Nov '25
(Nov '25: 222)

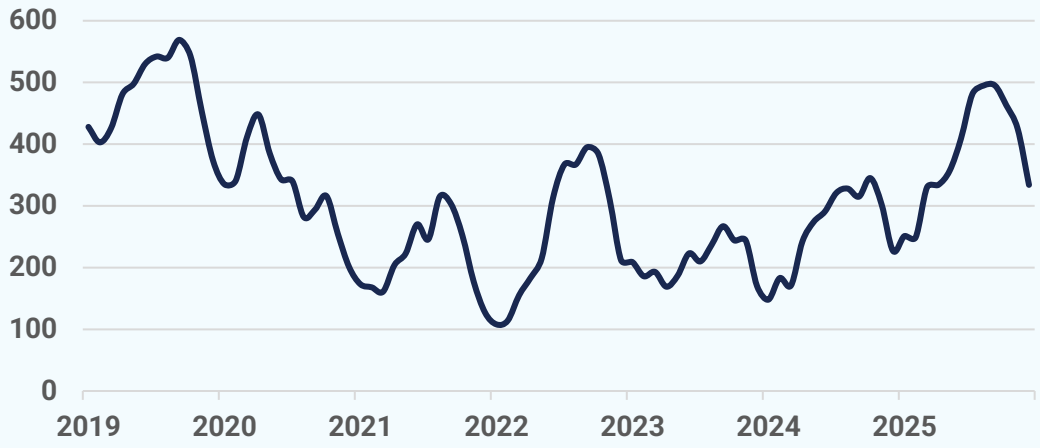


Active Listings

334
December 2025

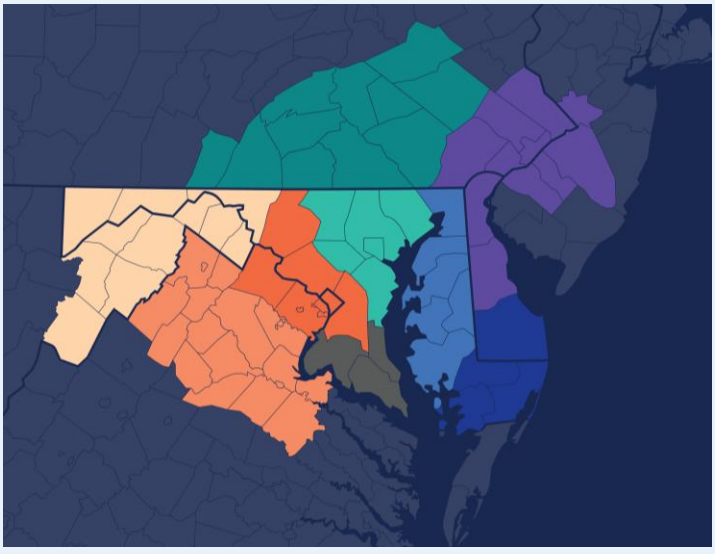
+47.1%
Dec '25 vs. Dec '24
(Dec '24: 227)

-21.4%
Dec '25 vs. Nov '25
(Nov '25: 425)



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North Central Virginia

December 2025 Condos Report

Prepared by Bright Research

Data as of January 7, 2025

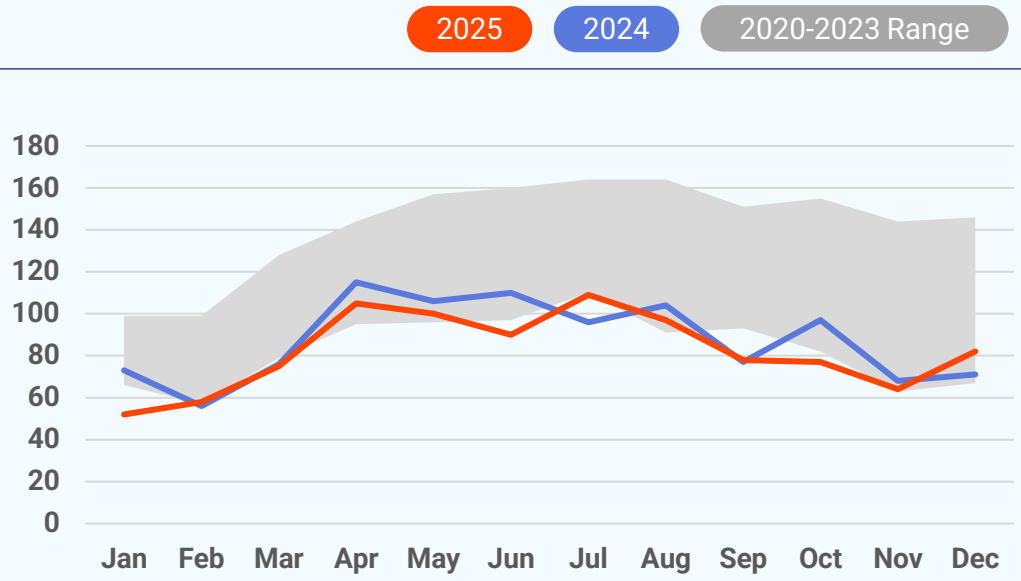
Key Market Statistics	Dec 2025	Dec 2024	Change
Closed Sales	82	71	+15.5%
Median Sold Price	$405,000	$380,000	+6.6%
Median Days on Market	34 days	14 days	+20 days
New Pending Sales	76	61	+24.6%
New Listings	63	56	+12.5%
Active Listings	185	101	+83.2%
Months of Supply	2.15	1.12	+1.03 mos.

Closed Sales

82
December 2025

+15.5%
Dec '25 vs. Dec '24
(Dec '24: 71)

+28.1%
Dec '25 vs. Nov '25
(Nov '25: 64)



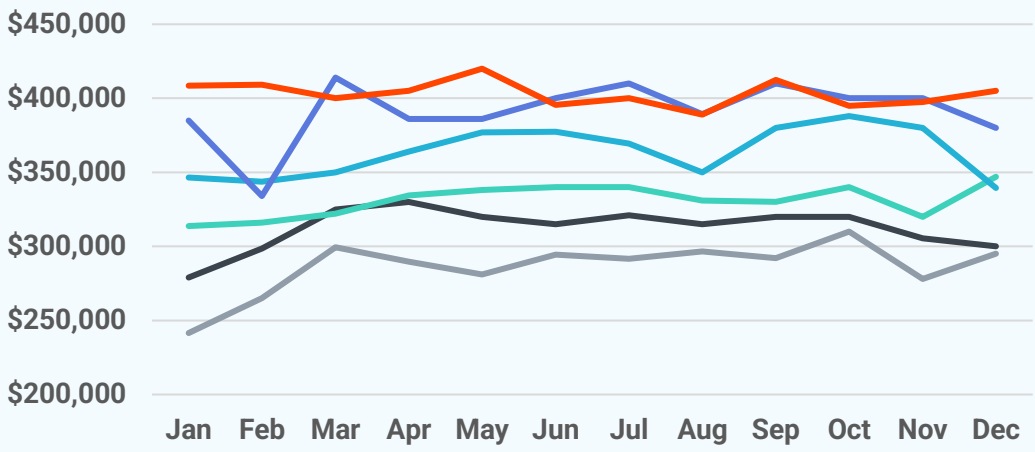
Median Sold Price

2025 2024 2023 2022 2021 2020

$405,000
December 2025

+6.6%
Dec '25 vs. Dec '24
(Dec '24: $380,000)

+1.9%
Dec '25 vs. Nov '25
(Nov '25: $397,450)



Median Days on Market

34 days
December 2025

+20 days
Dec '25 vs. Dec '24
(Dec '24: 14 days)

-2 days
Dec '25 vs. Nov '25
(Nov '25: 36 days)



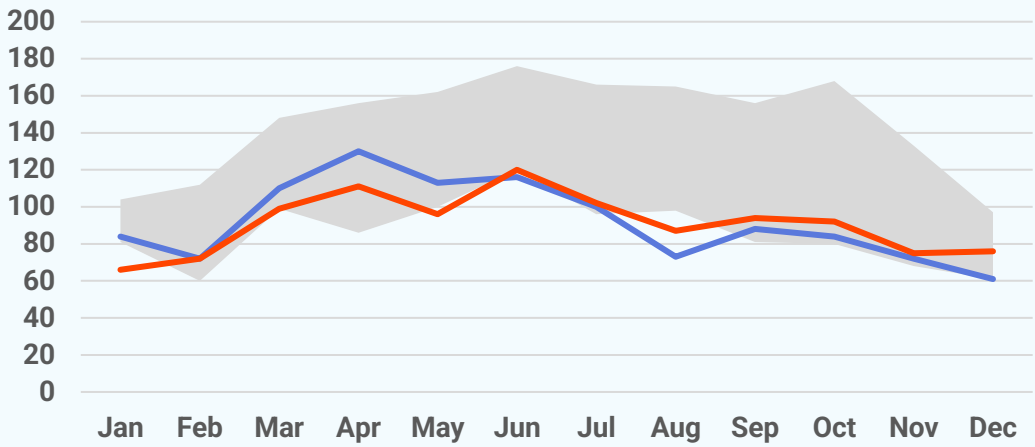
New Pending Sales

2025 2024 2020-2023 Range

76
December 2025

+24.6%
Dec '25 vs. Dec '24
(Dec '24: 61)

+1.3%
Dec '25 vs. Nov '25
(Nov '25: 75)



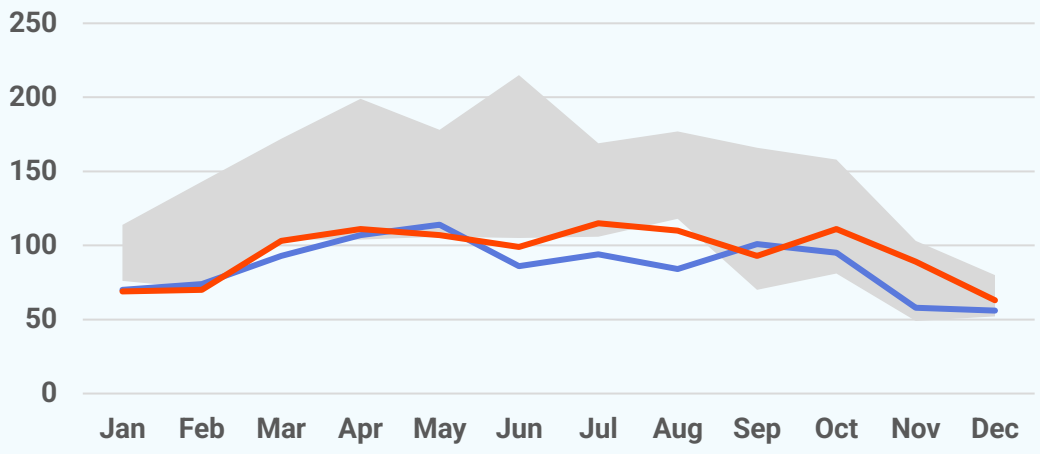
New Listings

2025 | 2024 | 2020-2023 Range

63
December 2025

+12.5%
Dec '25 vs. Dec '24
(Dec '24: 56)

-29.2%
Dec '25 vs. Nov '25
(Nov '25: 89)

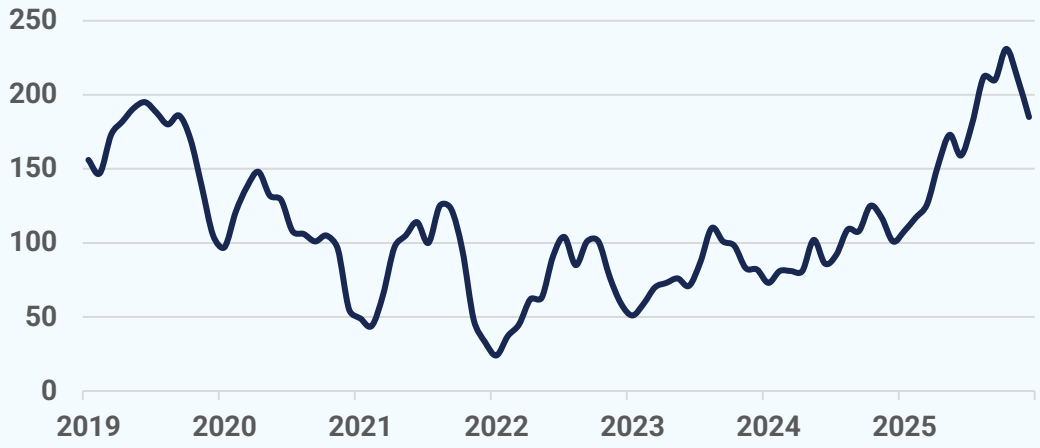


Active Listings

185
December 2025

+83.2%
Dec '25 vs. Dec '24
(Dec '24: 101)

-12.3%
Dec '25 vs. Nov '25
(Nov '25: 211)



About Bright MLS

Bright MLS was founded in 2016 as a collaboration between 43 visionary associations and two of the nation's most prominent MLSs to transform what an MLS is and what it does, so real estate pros and the people they serve can thrive today and into our data-driven future through an open, clear and competitive housing market for all. Bright is proud to be the source of truth for comprehensive real estate data in the Mid-Atlantic, with market intelligence currently covering six states (Delaware, Maryland, New Jersey, Pennsylvania, Virginia, West Virginia) and the District of Columbia.

