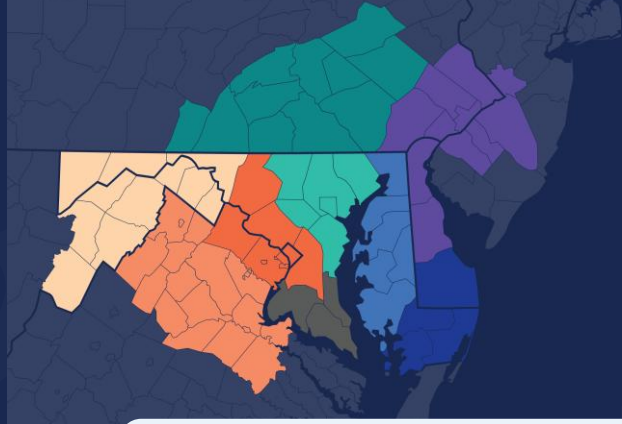
Mid-Atlantic Region

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	18,253	17,593	+3.8%	223,565	223,275	+0.1%
Median Sold Price	$415,000	$405,000	+2.5%	$424,900	$410,000	+3.6%
Median Days on Market	23 days	18 days	+5 days	15 days	11 days	+4 days
New Pending Sales	12,980	13,379	-3.0%	224,257	226,332	-0.9%
New Listings	11,399	11,531	-1.1%	297,317	285,488	+4.1%
Active Listings	36,578	30,823	+18.7%	36,578	30,823	+18.7%
Months of Supply	1.96	1.66	+0.3 mos.	1.96	1.66	+0.3 mos.
Showings	221,713	229,433	-3.4%	4,329,280	4,393,721	-1.5%

Housing Market Trends

Mid-Atlantic sales in 2025 were virtually the same as 2024, despite uptick in December. Some buyers took advantage of lower mortgage rates to close out the year while others are waiting to see what 2026 brings. There were 18,253 closed sales in December 2025 across the Mid-Atlantic, increasing 3.8% compared to December 2024. Overall, 2025 sales were just 0.1% higher than in 2024.

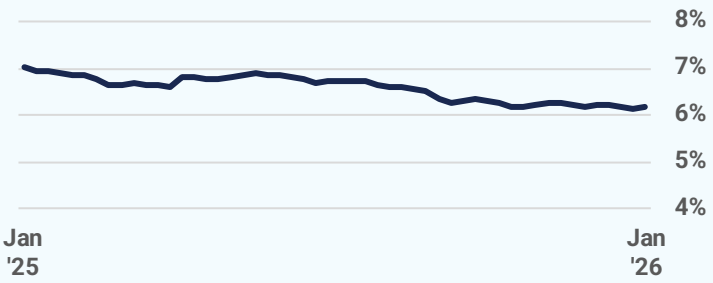
There are diverging trends in closed sales for the metros as affordability and other economic factors influence buying and selling decisions. More affordable regions such as Central Pennsylvania and the Maryland/West Viriginia Panhandle had strong gains in December while the Washington D.C. Metro, Del/Mar Coastal market, and Southern Maryland had fewer transactions this December.

Sellers also held back in the last month of the year, with 1.1% lower new listings. New listings overall were better in 2025, with 4.1% more homes added by sellers and inventory levels ending the year 18.7% higher than the end of 2024.

Market Outlook

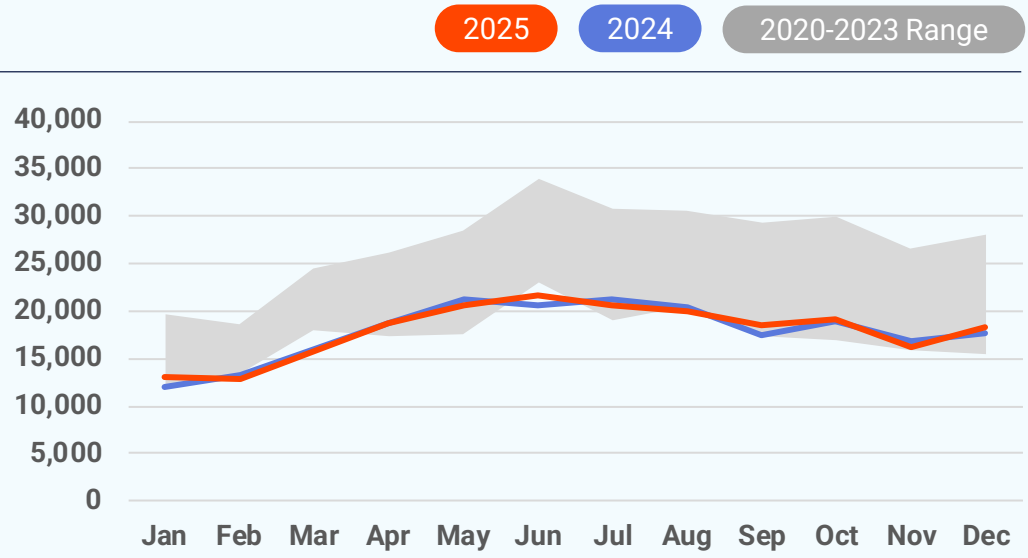
The 2025 housing market was slower as affordability constraints continue to weigh on some buyers and keep them on the sidelines. Market conditions will move more towards balance in 2026, as supply increases and price growth softens. Buyers will have more room for negotiation, but in some local markets, sellers will still have the upper hand.

Weekly Avg. Mortgage Rate 30-yr fixed rate



Source: Freddie Mac

Closed Sales

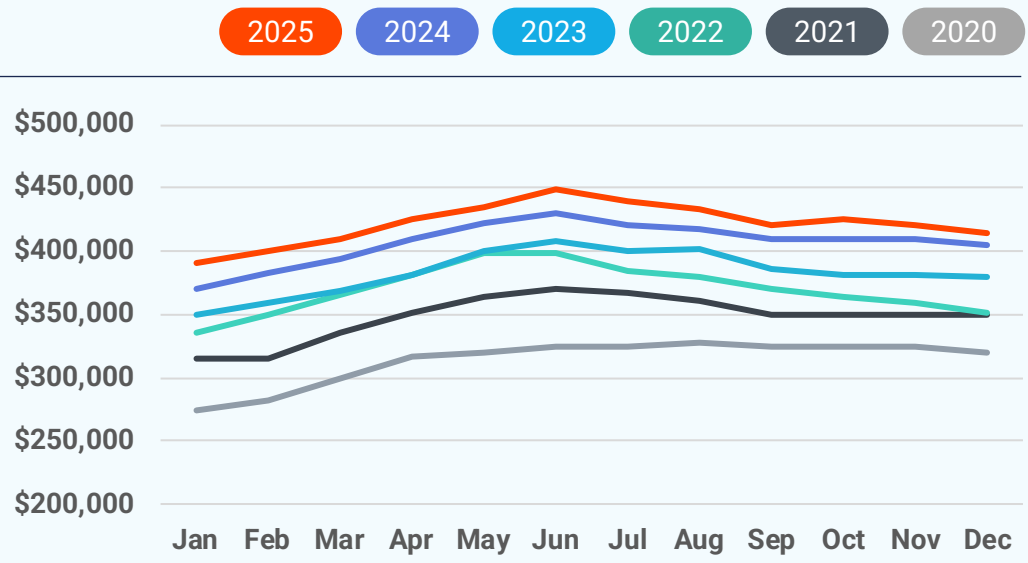


18,253
December 2025

+3.8%
Dec '25 vs. Dec '24
(Dec '24: 17,593)

+13.3%
Dec '25 vs. Nov '25
(Nov '25: 16,105)

Median Sold Price

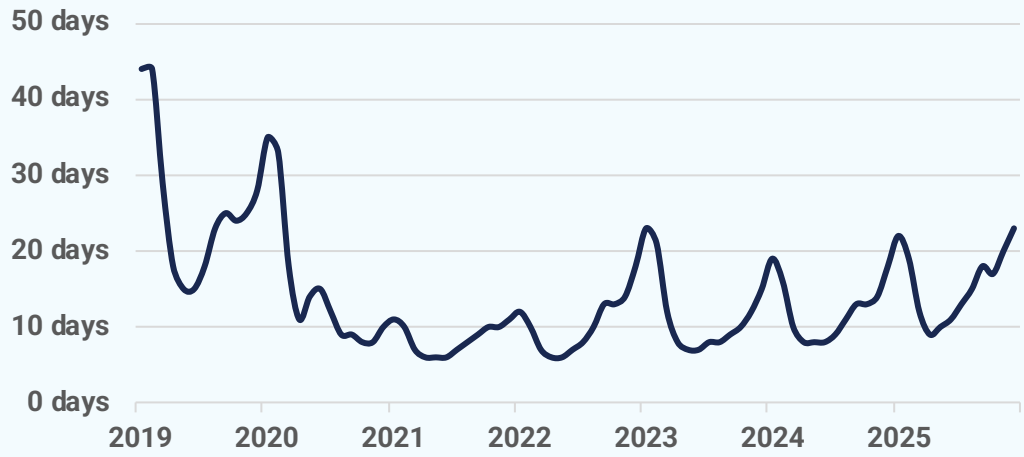


$415,000
December 2025

+2.5%
Dec '25 vs. Dec '24
(Dec '24: $405,000)

-1.2%
Dec '25 vs. Nov '25
(Nov '25: $420,000)

Median Days on Market



23 days
December 2025

+5 days
Dec '25 vs. Dec '24
(Dec '24: 18 days)

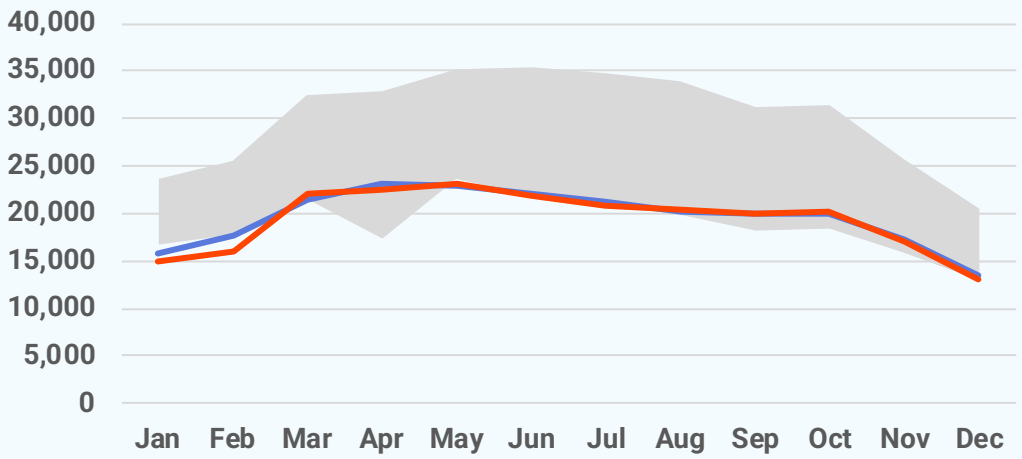
+3 days
Dec '25 vs. Nov '25
(Nov '25: 20 days)

New Pending Sales

12,980
December 2025

-3.0%
Dec '25 vs. Dec '24
(Dec '24: 13,379)

-23.6%
Dec '25 vs. Nov '25
(Nov '25: 16,998)

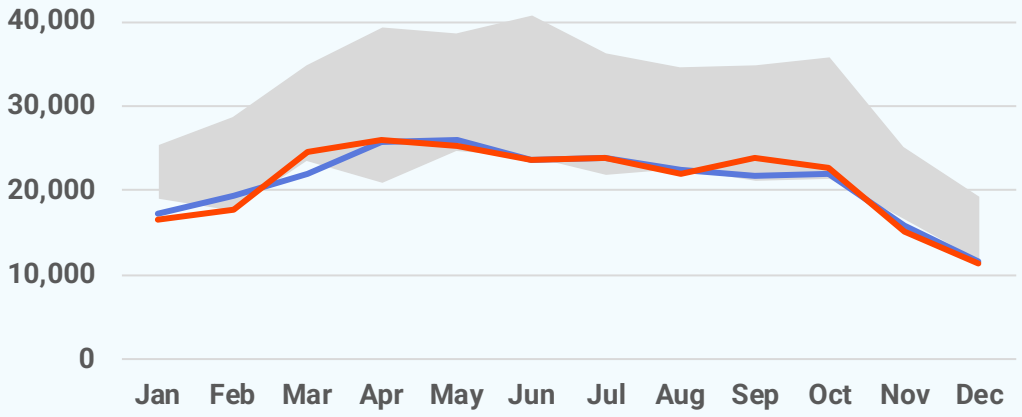


New Listings

11,399
December 2025

-1.1%
Dec '25 vs. Dec '24
(Dec '24: 11,531)

-25.0%
Dec '25 vs. Nov '25
(Nov '25: 15,196)

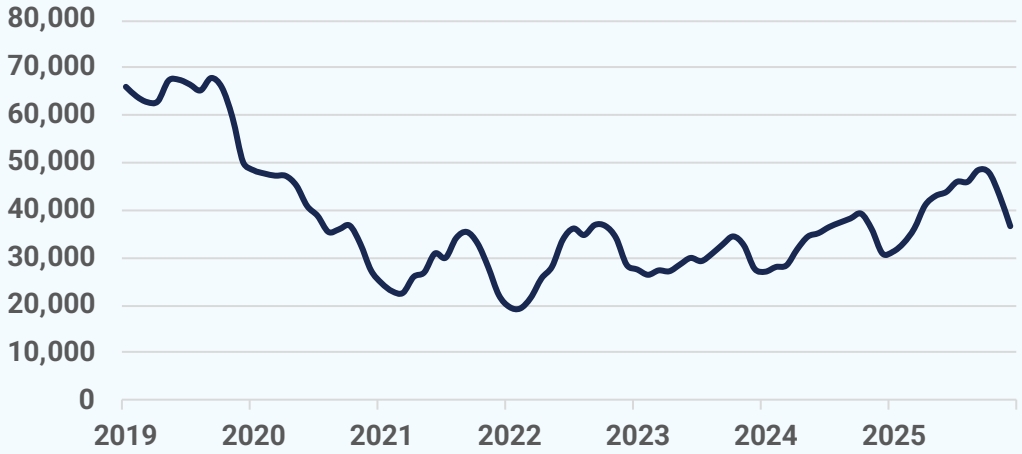


Active Listings

36,578
December 2025

+18.7%
Dec '25 vs. Dec '24
(Dec '24: 30,823)

-15.0%
Dec '25 vs. Nov '25
(Nov '25: 43,026)



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
Mid-Atlantic	18,253	+3.8%	$415,000	+2.5%	23 days	+5 days
Philadelphia Metro	5,471	+7.1%	$390,000	+5.4%	19 days	+2 days
Baltimore Metro	2,571	+2.1%	$397,000	+3.1%	22 days	+6 days
Washington, D.C. Metro	3,780	-2.0%	$620,000	+5.1%	27 days	+8 days
Central Pennsylvania	2,441	+9.9%	$294,990	+3.5%	15 days	+4 days
MD/WV Panhandle	673	+8.4%	$309,900	+3.3%	27 days	+4 days
MD Eastern Shore	307	+7.0%	$399,000	+6.4%	41 days	+18 days
Del/Mar Coastal	730	-2.3%	$420,000	+0.0%	47 days	+5 days
Southern Maryland	372	-0.5%	$450,000	+3.3%	25 days	+4 days
North Central Virginia	1,291	+1.6%	$489,950	+0.0%	26 days	+8 days

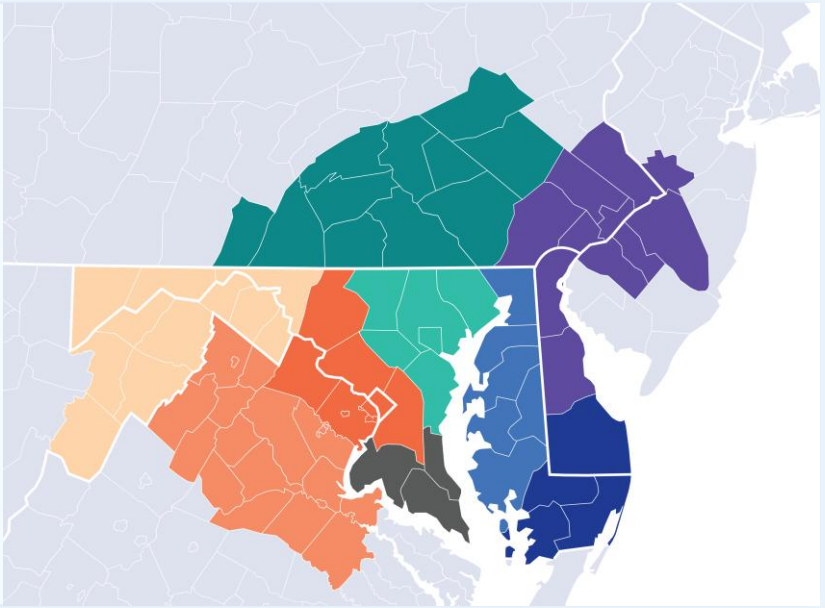
Local Markets	New Pending Sales		New Listings		Showings	
	Dec '25	vs. Dec '24	Dec '25	vs. Dec '24	Dec '25	vs. Dec '24
Mid-Atlantic	12,980	-3.0%	11,399	-1.1%	221,713	-3.4%
Philadelphia Metro	3,645	-4.2%	3,403	-2.4%	70,214	-7.0%
Baltimore Metro	1,963	-4.2%	1,632	+0.9%	32,504	-4.4%
Washington, D.C. Metro	2,795	+1.0%	2,133	+0.3%	55,144	-3.0%
Central Pennsylvania	1,629	-4.7%	1,516	-3.3%	20,793	-4.8%
MD/WV Panhandle	486	-5.3%	458	-12.4%	6,235	+3.5%
MD Eastern Shore	227	+17.6%	217	+11.3%	2,710	+15.7%
Del/Mar Coastal	481	-12.5%	435	-23.0%	6,193	-1.5%
Southern Maryland	307	-8.4%	282	+4.8%	4,519	-13.0%
North Central Virginia	991	-3.7%	876	+11.0%	16,006	+13.1%

Local Markets

	Active Listings		Months of Supply	
	Dec '25	vs. Dec '24	Dec '25	vs. Dec '24
Mid-Atlantic	36,578	+18.7%	1.96	+0.3 months
Philadelphia Metro	10,062	+7.5%	1.85	+0.11 months
Baltimore Metro	5,195	+27.8%	1.98	+0.45 months
Washington, D.C. Metro	7,044	+28.8%	1.71	+0.4 months
Central Pennsylvania	3,782	+17.9%	1.65	+0.21 months
MD/WV Panhandle	1,617	+15.8%	2.51	+0.34 months
MD Eastern Shore	939	+15.4%	3.10	+0.49 months
Del/Mar Coastal	2,828	+11.6%	3.65	+0.38 months
Southern Maryland	892	+30.0%	2.19	+0.54 months
North Central Virginia	2,669	+42.3%	1.95	+0.62 months

Local Market Map

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

Mid-Atlantic Region

December 2025 Detached Single-Family Home Report

Prepared by Bright Research

Data as of January 7, 2025

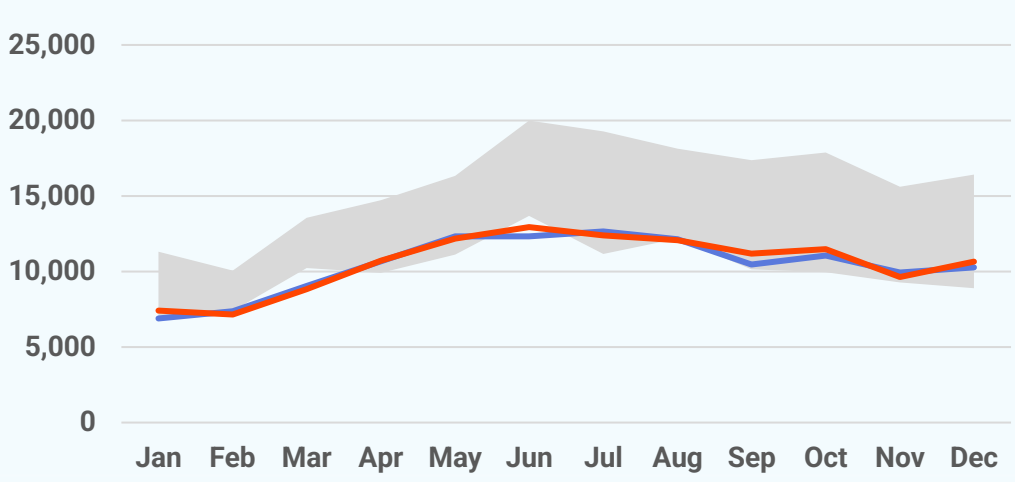
Key Market Statistics	Dec 2025	Dec 2024	Change
Closed Sales	10,654	10,264	+3.8%
Median Sold Price	$469,000	$450,000	+4.2%
Median Days on Market	21 days	17 days	+4 days
New Pending Sales	7,375	7,553	-2.4%
New Listings	6,139	6,187	-0.8%
Active Listings	19,776	16,814	+17.6%
Months of Supply	1.81	1.55	+0.26 mos.

Closed Sales

10,654
December 2025

+3.8%
Dec '25 vs. Dec '24
(Dec '24: 10,264)

+10.6%
Dec '25 vs. Nov '25
(Nov '25: 9,632)



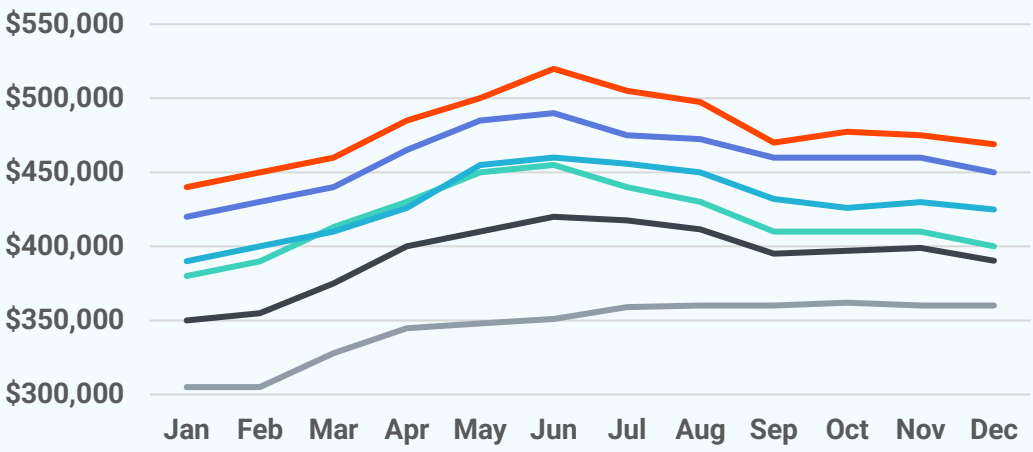
Median Sold Price

2025 2024 2023 2022 2021 2020

$469,000
December 2025

+4.2%
Dec '25 vs. Dec '24
(Dec '24: $450,000)

-1.3%
Dec '25 vs. Nov '25
(Nov '25: $475,000)

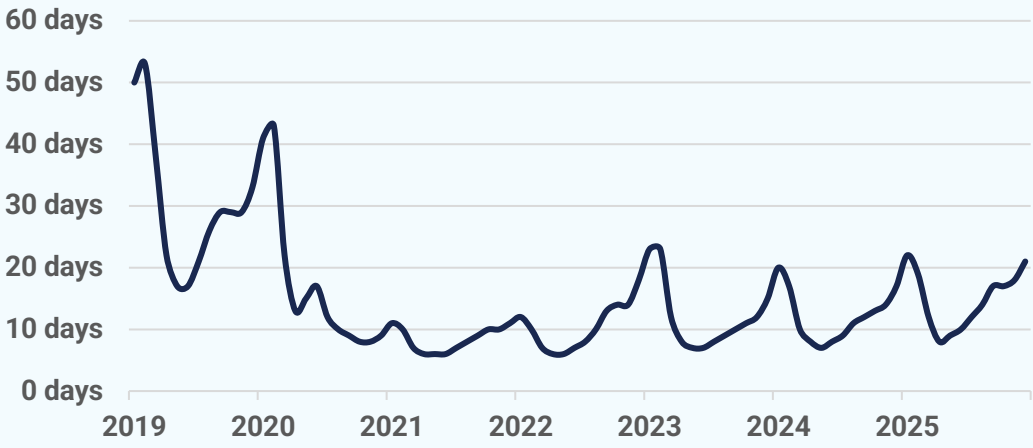


Median Days on Market

21 days
December 2025

+4 days
Dec '25 vs. Dec '24
(Dec '24: 17 days)

+3 days
Dec '25 vs. Nov '25
(Nov '25: 18 days)



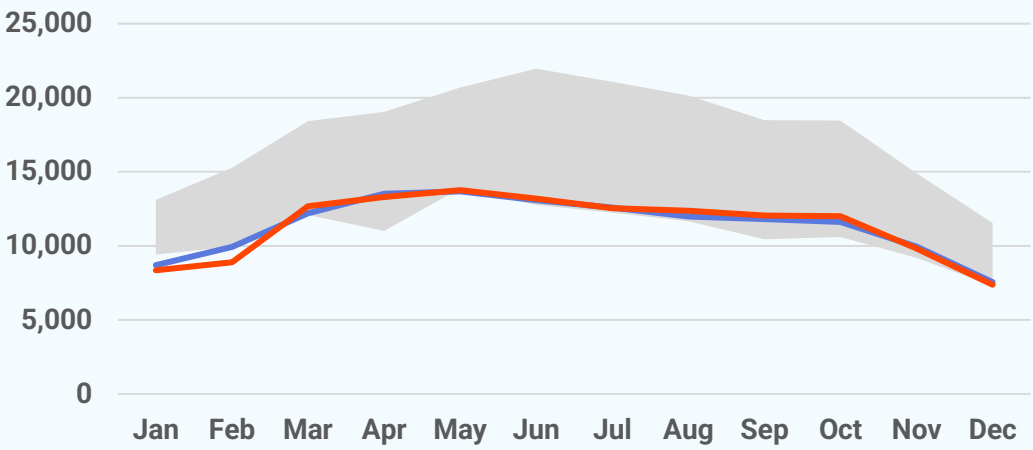
New Pending Sales

2025 2024 2020-2023 Range

7,375
December 2025

-2.4%
Dec '25 vs. Dec '24
(Dec '24: 7,553)

-25.0%
Dec '25 vs. Nov '25
(Nov '25: 9,829)



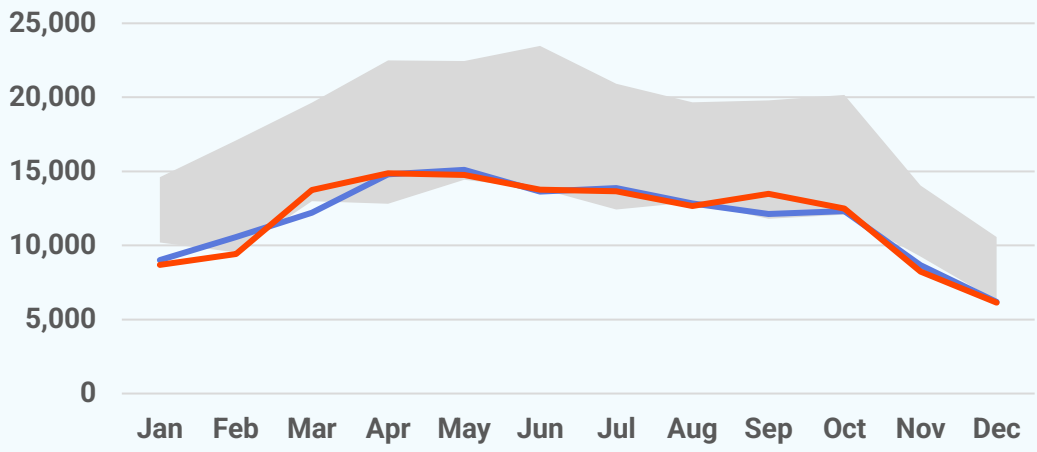
New Listings

2025 | 2024 | 2020-2023 Range

6,139
December 2025

-0.8%
Dec '25 vs. Dec '24
(Dec '24: 6,187)

-25.4%
Dec '25 vs. Nov '25
(Nov '25: 8,232)



Active Listings

19,776
December 2025

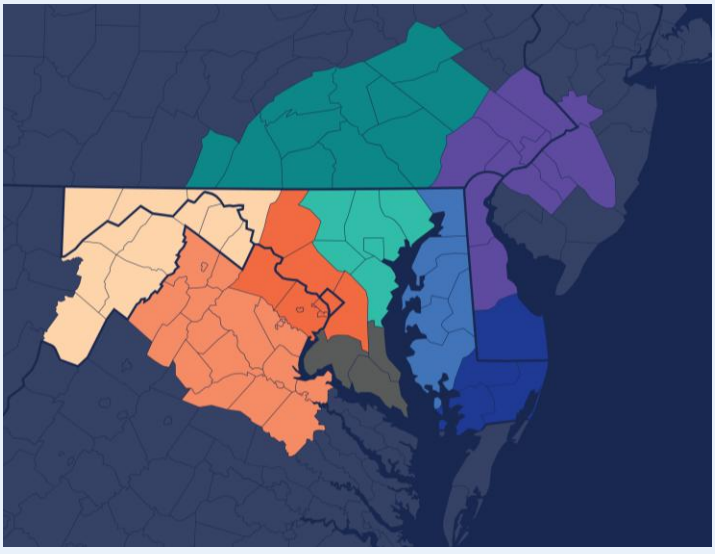
+17.6%
Dec '25 vs. Dec '24
(Dec '24: 16,814)

-15.1%
Dec '25 vs. Nov '25
(Nov '25: 23,306)



About Bright MLS

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Mid-Atlantic Region

December 2025 Attached/Townhomes Report

Prepared by Bright Research

Data as of January 7, 2025

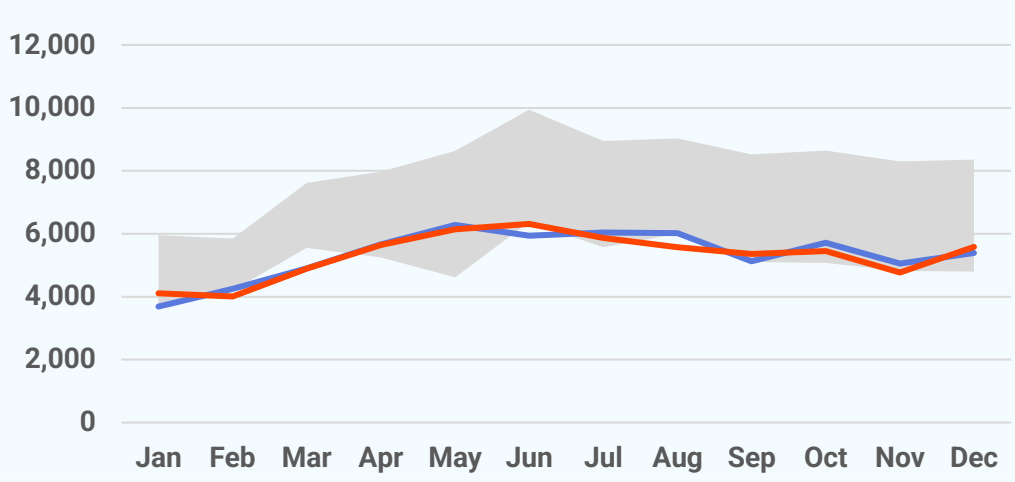
Key Market Statistics	Dec 2025	Dec 2024	Change
Closed Sales	5,580	5,392	+3.5%
Median Sold Price	$348,000	$340,000	+2.4%
Median Days on Market	22 days	18 days	+4 days
New Pending Sales	4,156	4,258	-2.4%
New Listings	3,938	3,960	-0.6%
Active Listings	11,407	9,624	+18.5%
Months of Supply	2.05	1.72	+0.33 mos.

Closed Sales

5,580
December 2025

+3.5%
Dec '25 vs. Dec '24
(Dec '24: 5,392)

+17.0%
Dec '25 vs. Nov '25
(Nov '25: 4,770)



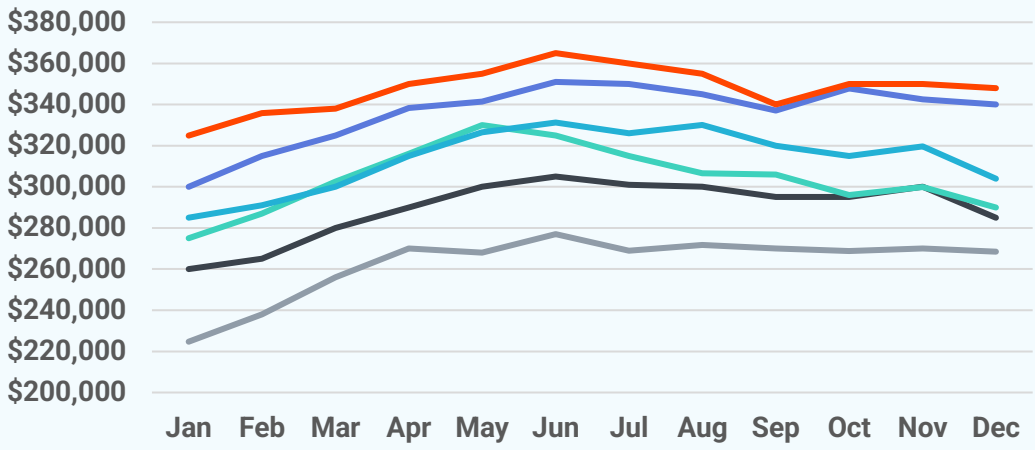
Median Sold Price

2025 2024 2023 2022 2021 2020

$348,000
December 2025

+2.4%
Dec '25 vs. Dec '24
(Dec '24: $340,000)

-0.6%
Dec '25 vs. Nov '25
(Nov '25: $350,000)

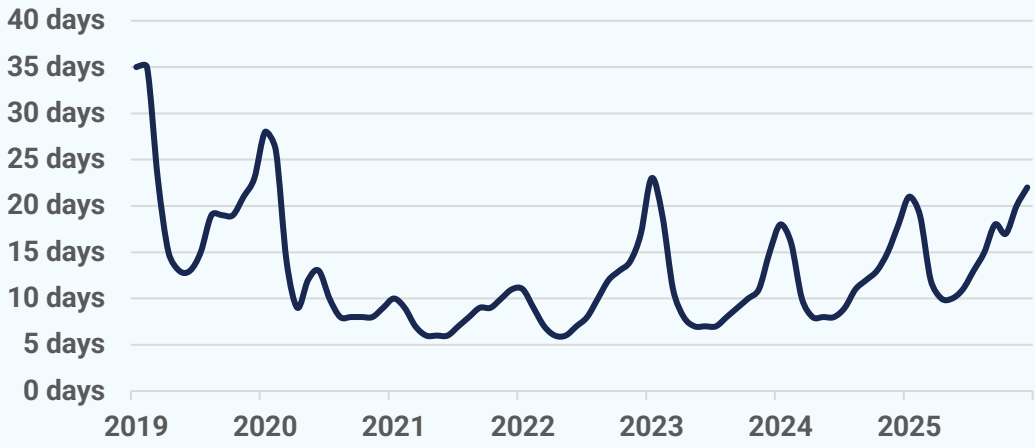


Median Days on Market

22 days
December 2025

+4 days
Dec '25 vs. Dec '24
(Dec '24: 18 days)

+2 days
Dec '25 vs. Nov '25
(Nov '25: 20 days)



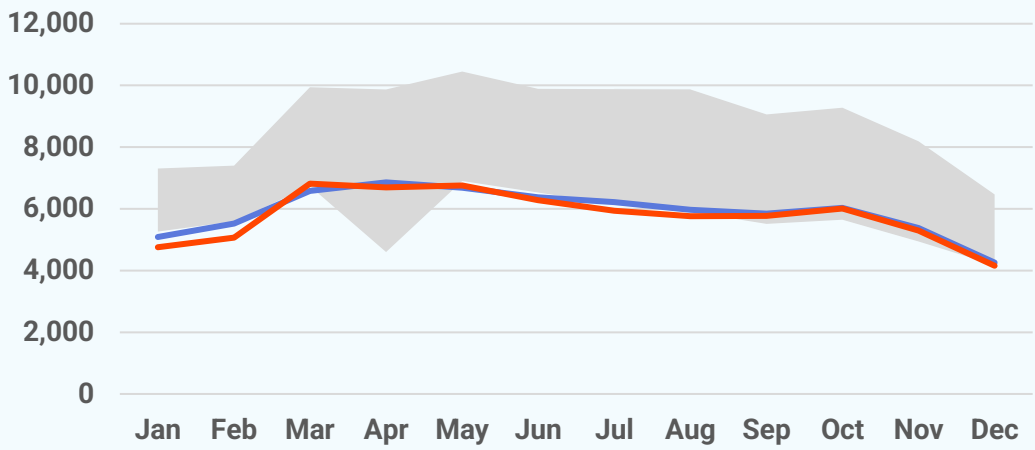
New Pending Sales

2025 2024 2020-2023 Range

4,156
December 2025

-2.4%
Dec '25 vs. Dec '24
(Dec '24: 4,258)

-21.5%
Dec '25 vs. Nov '25
(Nov '25: 5,292)



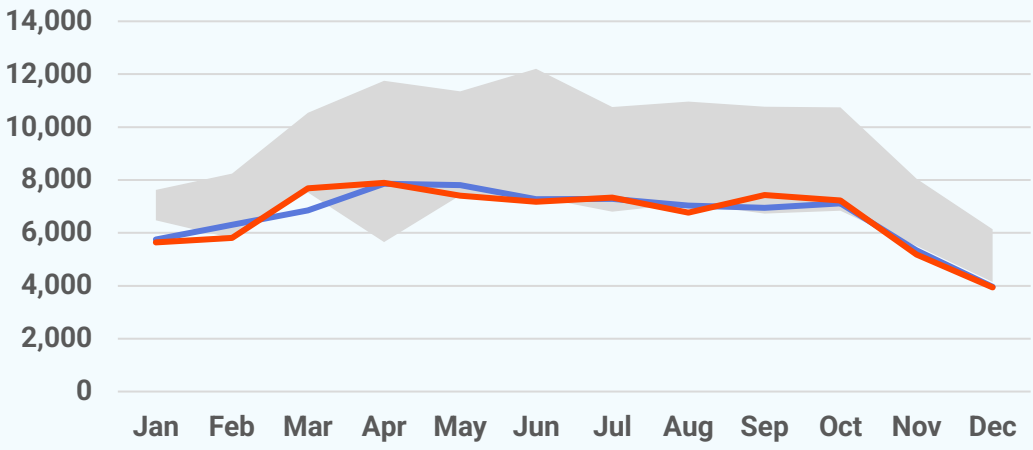
New Listings

2025 | 2024 | 2020-2023 Range

3,938
December 2025

-0.6%
Dec '25 vs. Dec '24
(Dec '24: 3,960)

-24.0%
Dec '25 vs. Nov '25
(Nov '25: 5,184)

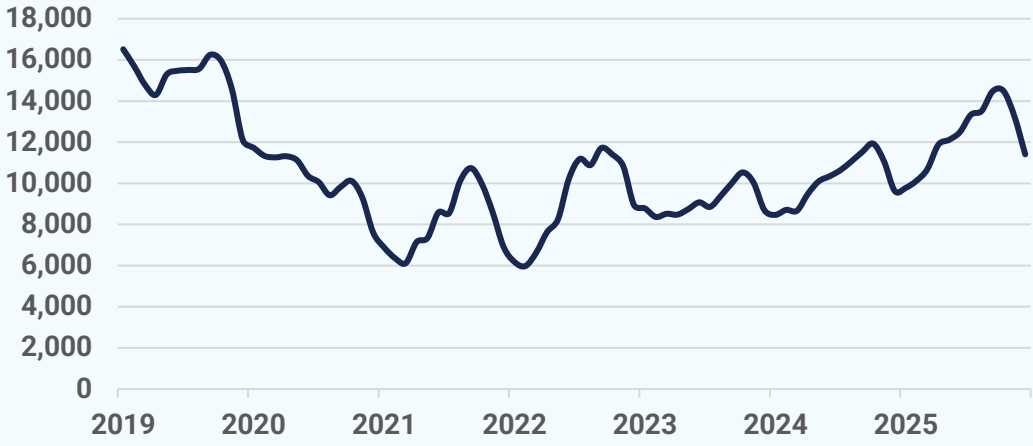


Active Listings

11,407
December 2025

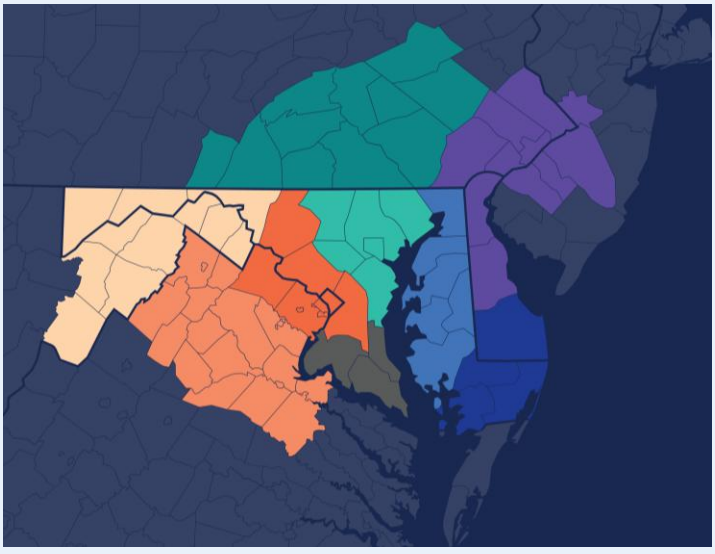
+18.5%
Dec '25 vs. Dec '24
(Dec '24: 9,624)

-14.0%
Dec '25 vs. Nov '25
(Nov '25: 13,268)



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Mid-Atlantic Region

December 2025 Condos Report

Prepared by Bright Research

Data as of January 7, 2025

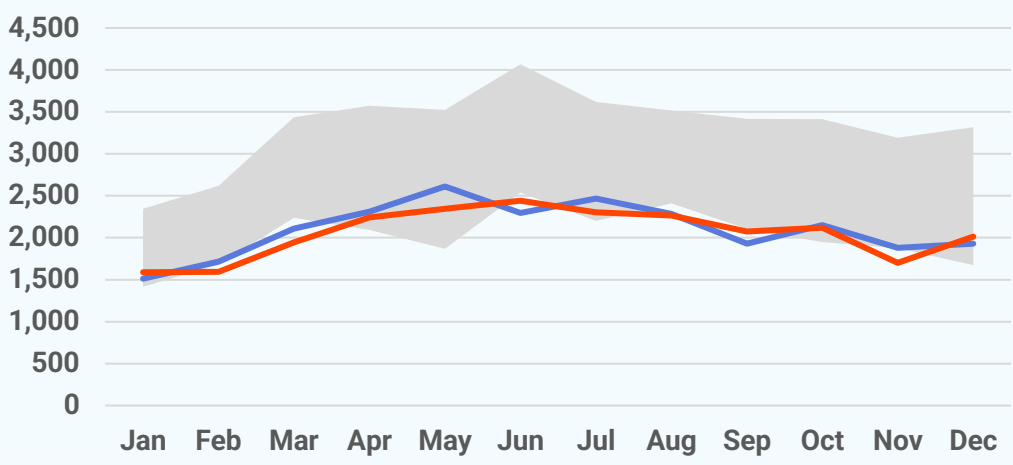
Key Market Statistics	Dec 2025	Dec 2024	Change
Closed Sales	2,015	1,929	+4.5%
Median Sold Price	$347,750	$349,250	-0.4%
Median Days on Market	32 days	22 days	+10 days
New Pending Sales	1,440	1,560	-7.7%
New Listings	1,317	1,380	-4.6%
Active Listings	5,395	4,385	+23.0%
Months of Supply	2.53	2.02	+0.51 mos.

Closed Sales

2,015
December 2025

+4.5%
Dec '25 vs. Dec '24
(Dec '24: 1,929)

+18.6%
Dec '25 vs. Nov '25
(Nov '25: 1,699)



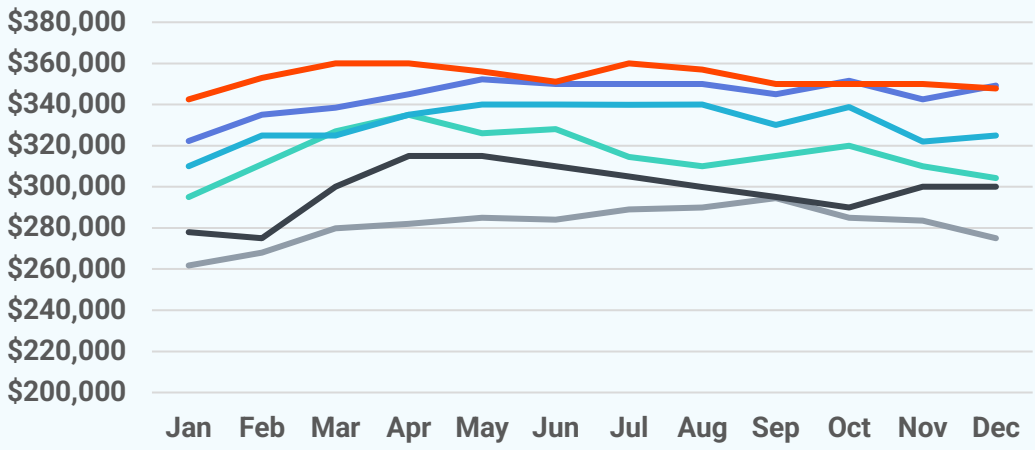
Median Sold Price

2025 2024 2023 2022 2021 2020

$347,750
December 2025

-0.4%
Dec '25 vs. Dec '24
(Dec '24: $349,250)

-0.6%
Dec '25 vs. Nov '25
(Nov '25: $350,000)

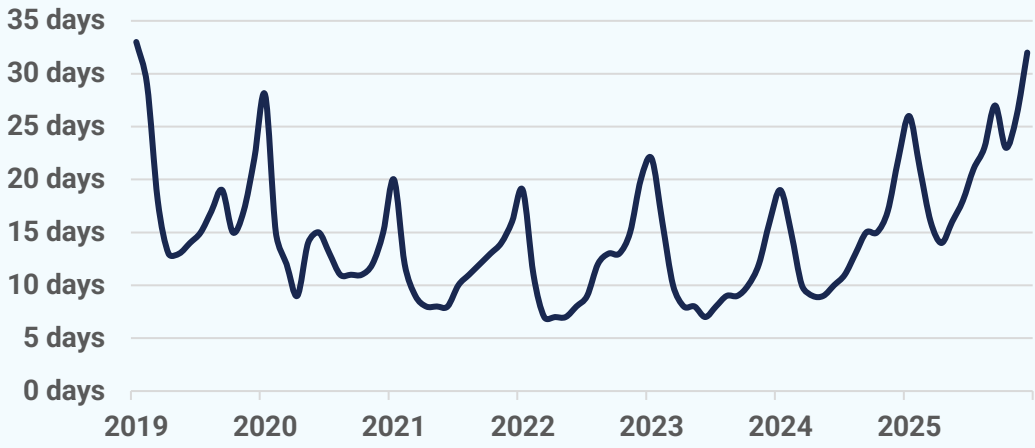


Median Days on Market

32 days
December 2025

+10 days
Dec '25 vs. Dec '24
(Dec '24: 22 days)

+6 days
Dec '25 vs. Nov '25
(Nov '25: 26 days)



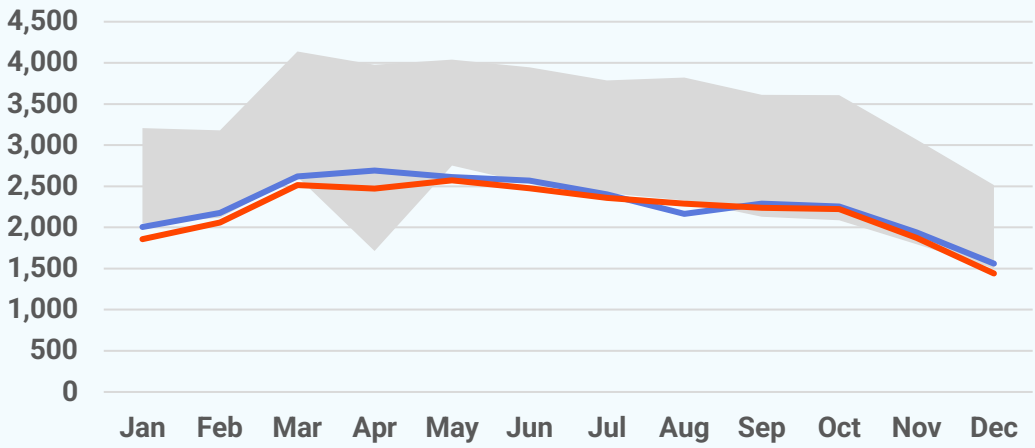
New Pending Sales

2025 2024 2020-2023 Range

1,440
December 2025

-7.7%
Dec '25 vs. Dec '24
(Dec '24: 1,560)

-23.2%
Dec '25 vs. Nov '25
(Nov '25: 1,874)



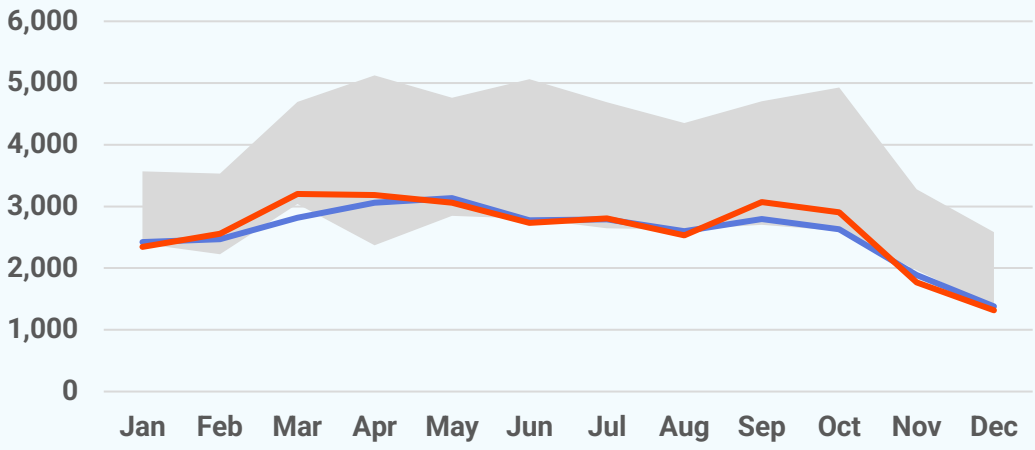
New Listings

2025 | 2024 | 2020-2023 Range

1,317
December 2025

-4.6%
Dec '25 vs. Dec '24
(Dec '24: 1,380)

-25.6%
Dec '25 vs. Nov '25
(Nov '25: 1,769)



Active Listings

5,395
December 2025

+23.0%
Dec '25 vs. Dec '24
(Dec '24: 4,385)

-16.4%
Dec '25 vs. Nov '25
(Nov '25: 6,452)



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.

