

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	372	374	-0.5%	4,891	4,991	-2.0%
Median Sold Price	\$450,000	\$435,450	+3.3%	\$449,970	\$435,000	+3.4%
Median Days on Market	25 days	21 days	+4 days	19 days	14 days	+5 days
New Pending Sales	307	335	-8.4%	4,933	5,038	-2.1%
New Listings	282	269	+4.8%	6,887	6,250	+10.2%
Active Listings	892	686	+30.0%	892	686	+30.0%
Months of Supply	2.19	1.65	+0.54 mos.	2.19	1.65	+0.54 mos.
Showings	4,519	5,195	-13.0%	83,689	86,553	-3.3%

Housing Market Trends

Sluggish buyer activity closes out the year in Southern Maryland. Overall sales tracked 2.0% lower in 2025 compared to 2024 in the Southern Maryland market. In December, sales were down 0.5% year-over-year while new pending sales decreased 8.4% year-over-year. Each county in the region had fewer transactions in 2025, with Charles County faring the best, down by just 0.3%.

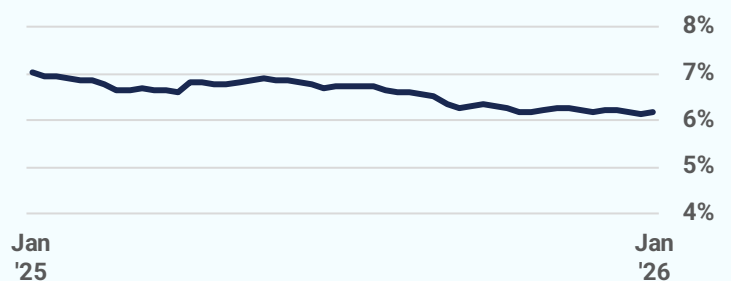
Though buyers hesitated, sellers had motivations to list. New listing increased 4.8% in December, and for the year as a whole, there were 10.2% more new listings in 2025 than 2024. Stronger seller activity, especially relative to buyers, strengthened supply levels across Southern Maryland. At the end of the year there were 30.0% more homes on the market than the conclusion of 2024.

Inventory gains and tepid demand, in light of job weakness and economic concerns, kept homes on the market longer in 2025. In December, closed sales were on the market four days longer than a year ago and throughout the year, homes on average were on for five more days in 2025.

Market Outlook

After a rocky 2025, hampered by economic uncertainty and the direct impact from the federal government layoffs, Southern Maryland's housing market will perform better in 2026. Improvement will be tepid as some buyers hold back in the new year as affordability continues to be a constraint. Yet the area should see more sales, growing supply, and slower price growth in 2026.

Weekly Avg. Mortgage Rate 30-yr fixed rate



Source: Freddie Mac

Closed Sales

2025

2024

2020-2023 Range

372

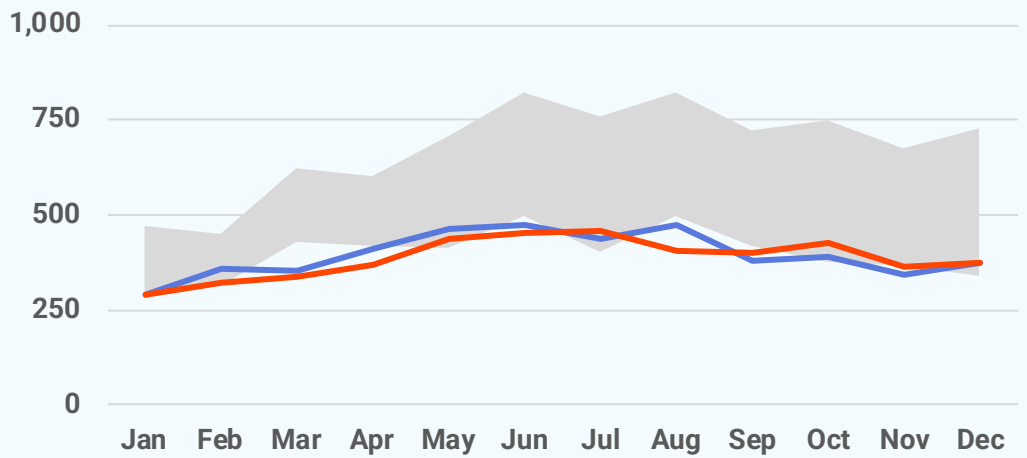
December 2025

-0.5%

Dec '25 vs. Dec '24
(Dec '24: 374)

+1.9%

Dec '25 vs. Nov '25
(Nov '25: 365)



Median Sold Price

2025

2024

2023

2022

2021

2020

\$450,000

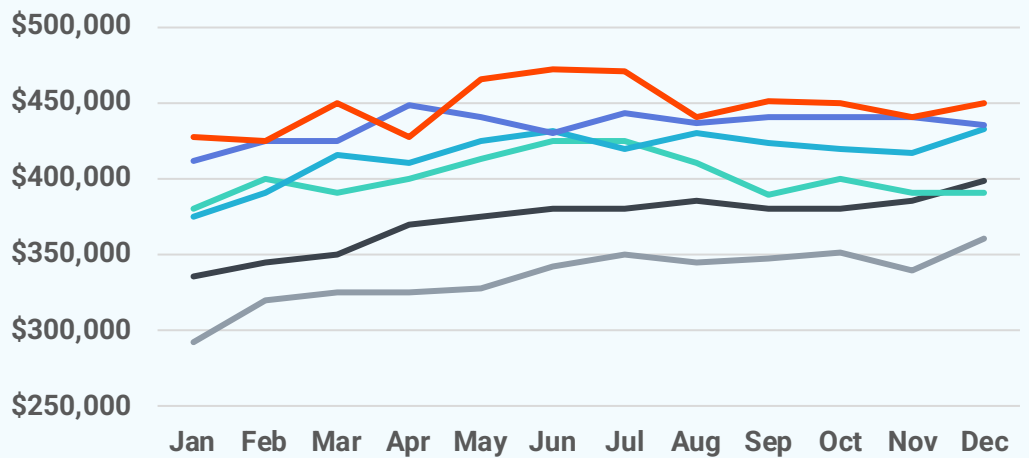
December 2025

+3.3%

Dec '25 vs. Dec '24
(Dec '24: \$435,450)

+2.3%

Dec '25 vs. Nov '25
(Nov '25: \$439,990)



Median Days on Market

25 days

December 2025

+4 days

Dec '25 vs. Dec '24
(Dec '24: 21 days)

-5 days

Dec '25 vs. Nov '25
(Nov '25: 30 days)



New Pending Sales

2025

2024

2020-2023 Range

307

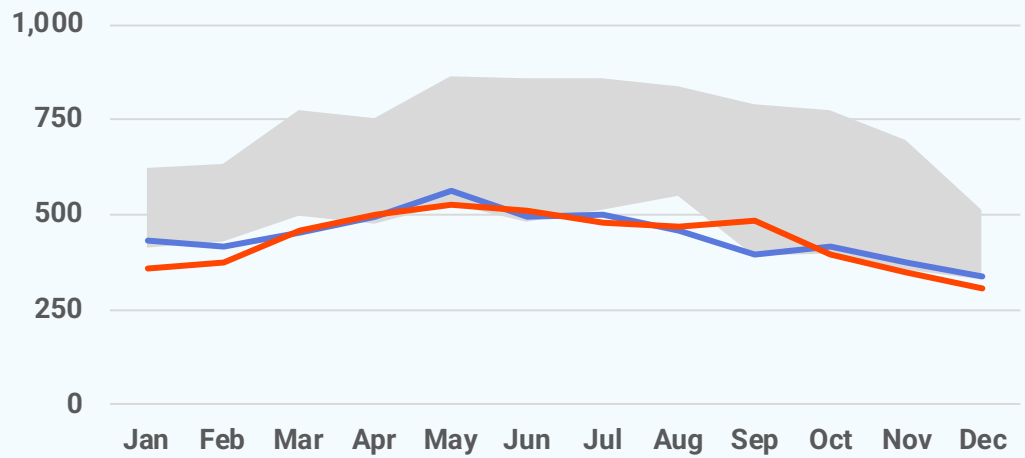
December 2025

-8.4%

Dec '25 vs. Dec '24
(Dec '24: 335)

-11.8%

Dec '25 vs. Nov '25
(Nov '25: 348)



New Listings

2025

2024

2020-2023 Range

282

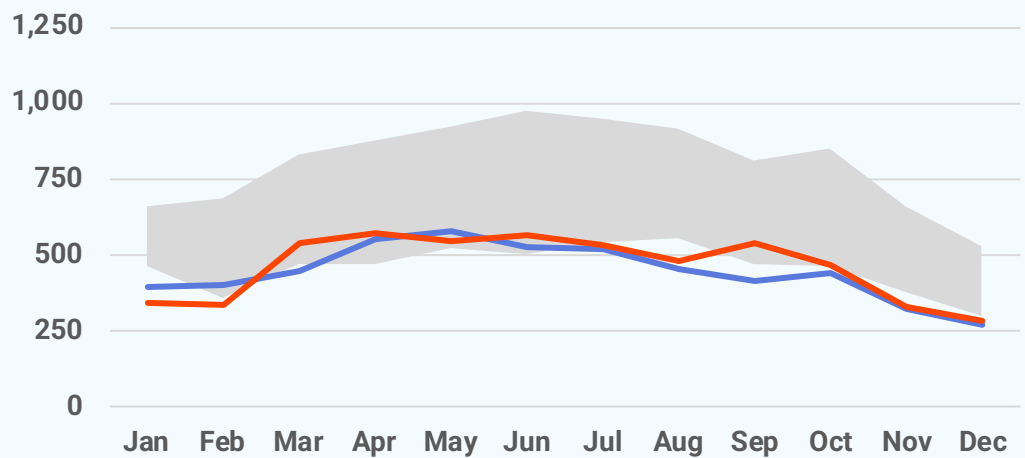
December 2025

+4.8%

Dec '25 vs. Dec '24
(Dec '24: 269)

-14.3%

Dec '25 vs. Nov '25
(Nov '25: 329)



Active Listings

892

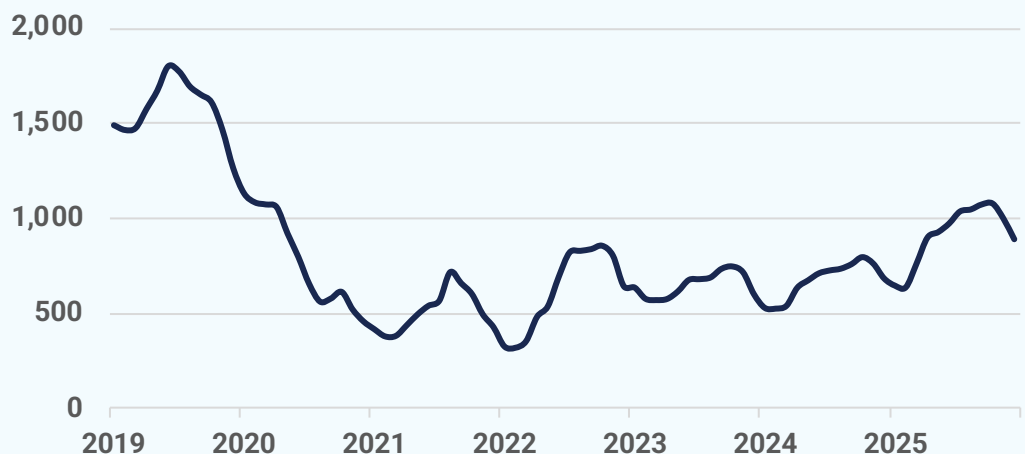
December 2025

+30.0%

Dec '25 vs. Dec '24
(Dec '24: 686)

-10.9%

Dec '25 vs. Nov '25
(Nov '25: 1,001)



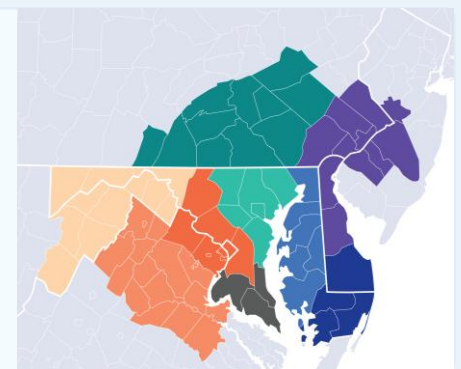
Local Markets	Closed Sales		Median Sales Price		Median Days on Market	
	Dec '25	vs. Dec '24	Dec '25	vs. Dec '24	Dec '25	vs. Dec '24
Southern MD	372	-0.5%	\$450,000	+3.3%	25 days	+4 days
Calvert County, MD	90	-1.1%	\$463,700	+0.3%	15 days	-3 days
Charles County, MD	174	-4.4%	\$452,500	+5.8%	37 days	+16 days
Saint Mary's County, MD	108	+6.9%	\$442,450	+10.6%	18 days	-5 days

Local Markets	New Pending Sales		New Listings		Showings	
	Dec '25	vs. Dec '24	Dec '25	vs. Dec '24	Dec '25	vs. Dec '24
Southern MD	307	-8.4%	282	+4.8%	4,519	-13.0%
Calvert County, MD	57	-23.0%	67	+48.9%	1,091	-4.0%
Charles County, MD	161	-8.5%	139	-15.2%	2,530	-12.7%
Saint Mary's County, MD	89	+4.7%	76	+26.7%	898	-22.5%

Local Markets	Active Listings		Months of Supply	
	Dec '25	vs. Dec '24	Dec '25	vs. Dec '24
Southern MD	892	+30.0%	2.19	+0.54 months
Calvert County, MD	188	+32.4%	1.98	+0.55 months
Charles County, MD	533	+38.8%	2.65	+0.75 months
Saint Mary's County, MD	171	+6.9%	1.55	+0.15 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



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.

Please contact **Christy Reap**,
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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	292	281	+3.9%
Median Sold Price	\$495,000	\$465,000	+6.5%
Median Days on Market	26 days	21 days	+5 days
New Pending Sales	241	248	-2.8%
New Listings	214	182	+17.6%
Active Listings	693	544	+27.4%
Months of Supply	2.21	1.69	+0.52 mos.

Closed Sales

2025

2024

2020-2023 Range

292

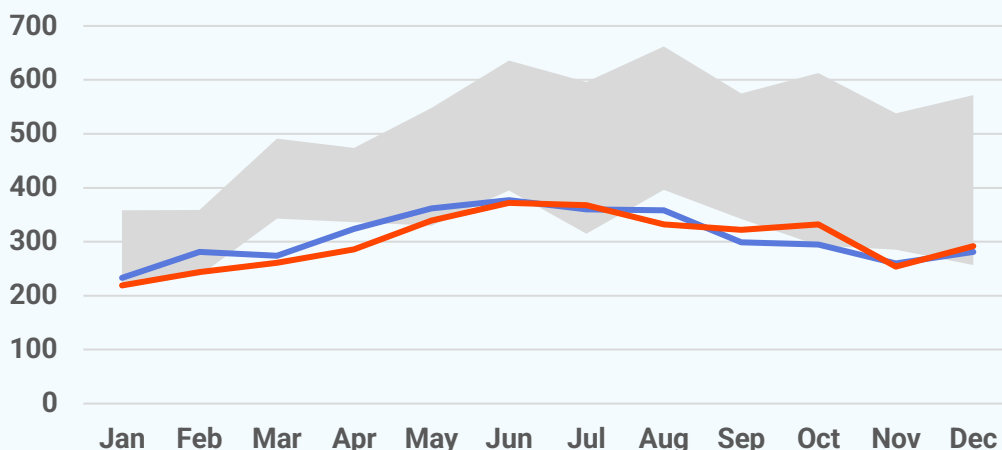
December 2025

+3.9%

Dec '25 vs. Dec '24
(Dec '24: 281)

+15.0%

Dec '25 vs. Nov '25
(Nov '25: 254)



Median Sold Price

2025 2024 2023 2022 2021 2020

\$495,000

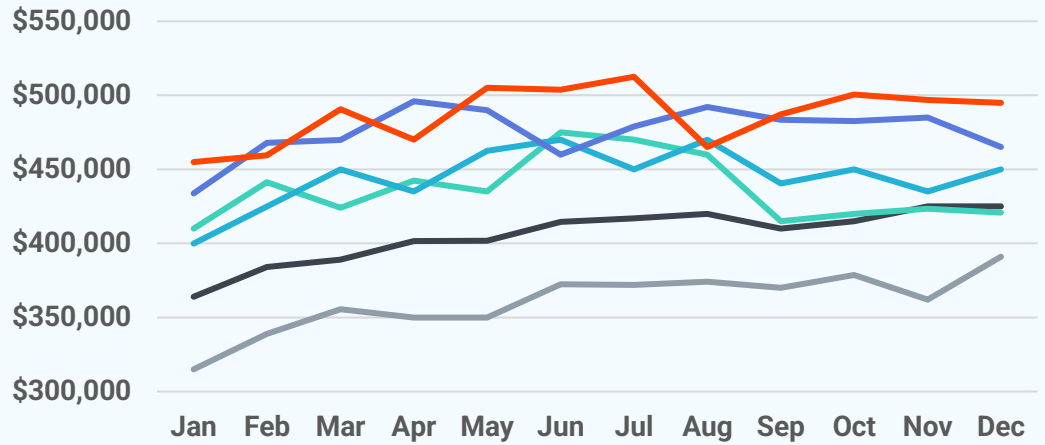
December 2025

+6.5%

Dec '25 vs. Dec '24
(Dec '24: \$465,000)

-0.4%

Dec '25 vs. Nov '25
(Nov '25: \$496,945)



Median Days on Market

26 days

December 2025

+5 days

Dec '25 vs. Dec '24
(Dec '24: 21 days)

-6 days

Dec '25 vs. Nov '25
(Nov '25: 32 days)



New Pending Sales

2025 2024 2020-2023 Range

241

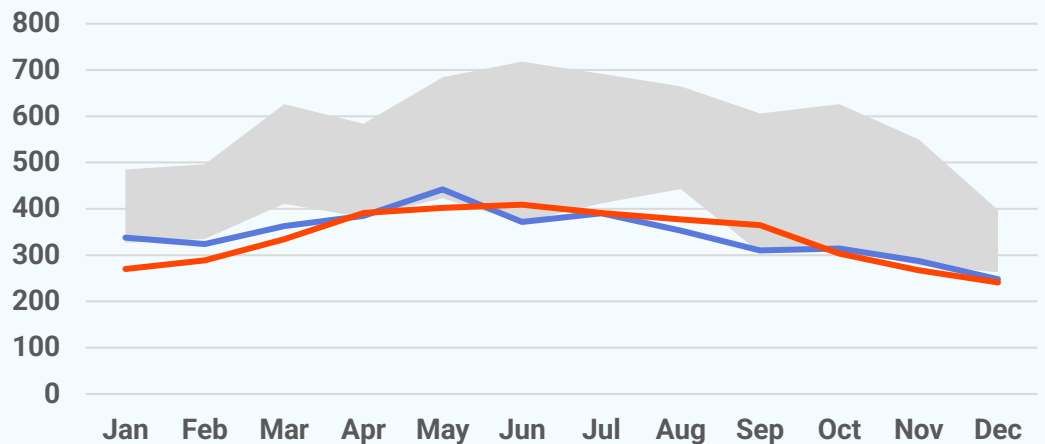
December 2025

-2.8%

Dec '25 vs. Dec '24
(Dec '24: 248)

-9.7%

Dec '25 vs. Nov '25
(Nov '25: 267)



New Listings

2025

2024

2020-2023 Range

214

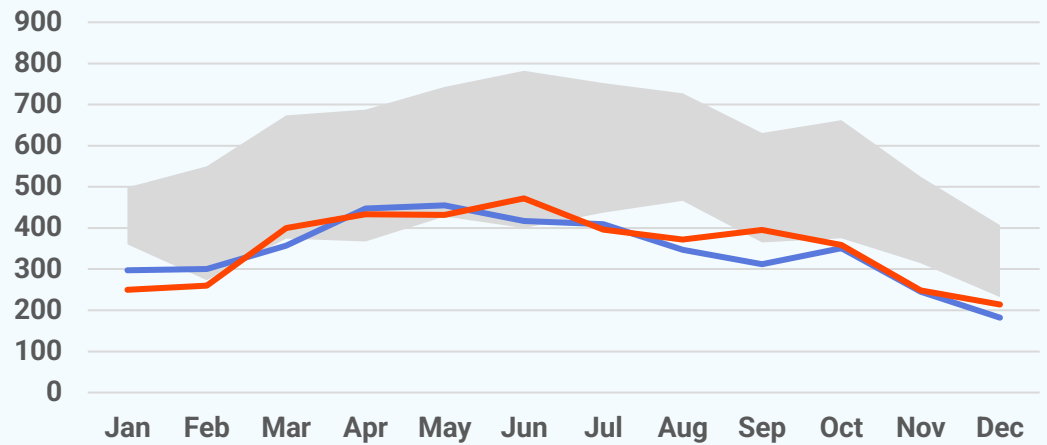
December 2025

+17.6%

Dec '25 vs. Dec '24
(Dec '24: 182)

-13.7%

Dec '25 vs. Nov '25
(Nov '25: 248)



Active Listings

693

December 2025

+27.4%

Dec '25 vs. Dec '24
(Dec '24: 544)

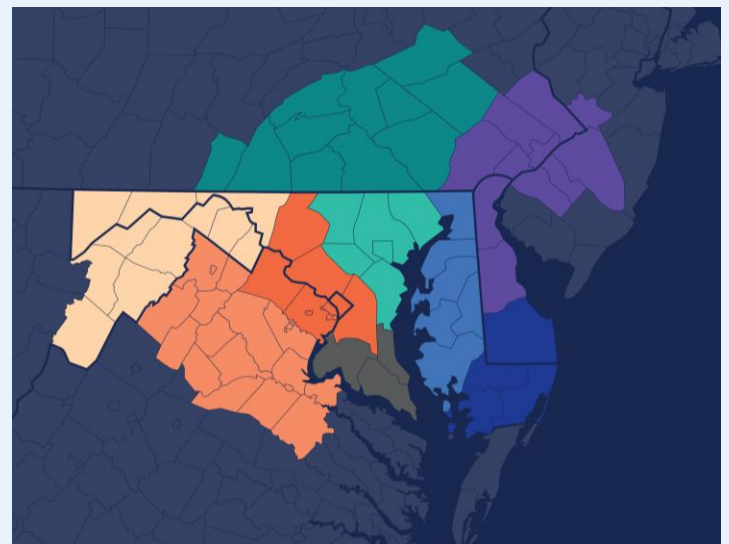
-12.9%

Dec '25 vs. Nov '25
(Nov '25: 796)



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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	71	85	-16.5%
Median Sold Price	\$385,000	\$365,000	+5.5%
Median Days on Market	23 days	24 days	-1 day
New Pending Sales	59	74	-20.3%
New Listings	62	80	-22.5%
Active Listings	184	123	+49.6%
Months of Supply	2.22	1.50	+0.72 mos.

Closed Sales

2025

2024

2020-2023 Range

71

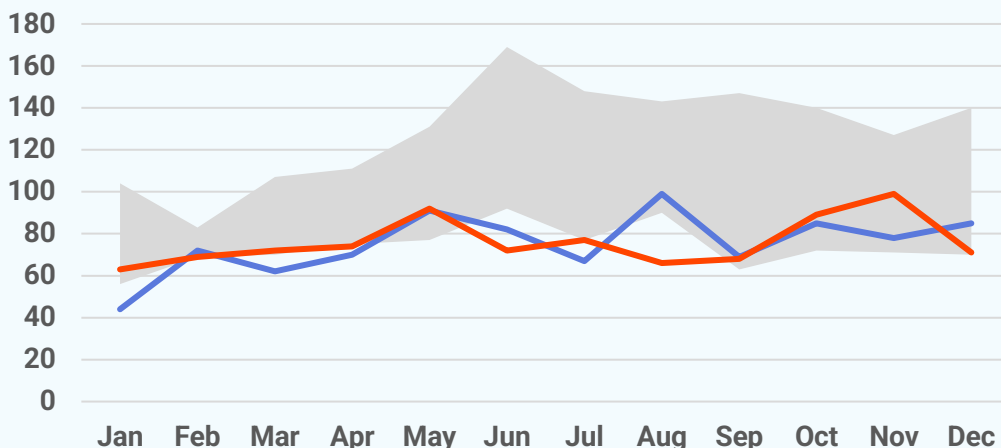
December 2025

-16.5%

Dec '25 vs. Dec '24
(Dec '24: 85)

-28.3%

Dec '25 vs. Nov '25
(Nov '25: 99)



Median Sold Price

2025 2024 2023 2022 2021 2020

\$385,000

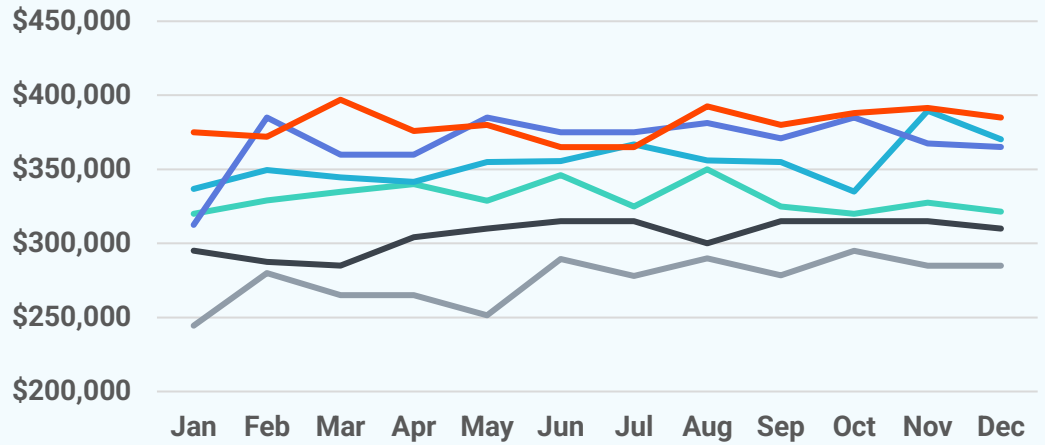
December 2025

+5.5%

Dec '25 vs. Dec '24
(Dec '24: \$365,000)

-1.7%

Dec '25 vs. Nov '25
(Nov '25: \$391,490)



Median Days on Market

23 days

December 2025

-1 day

Dec '25 vs. Dec '24
(Dec '24: 24 days)

-6 days

Dec '25 vs. Nov '25
(Nov '25: 29 days)



New Pending Sales

2025 2024 2020-2023 Range

59

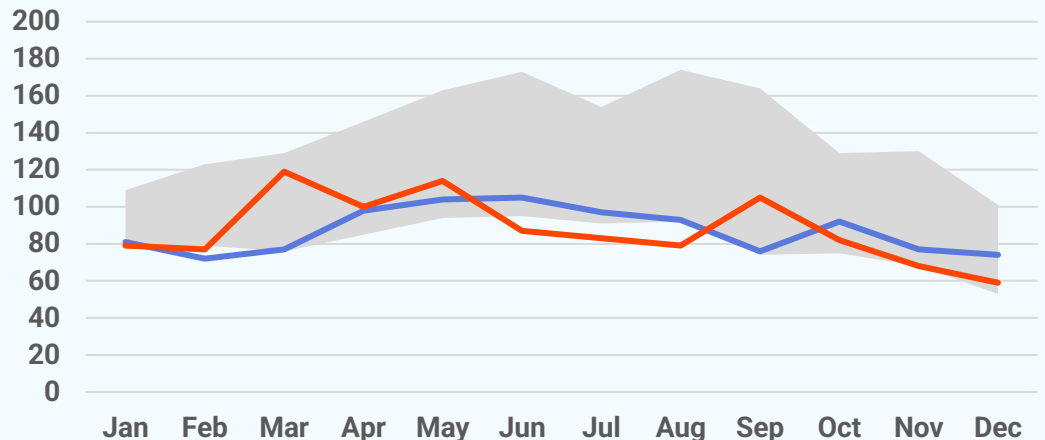
December 2025

-20.3%

Dec '25 vs. Dec '24
(Dec '24: 74)

-13.2%

Dec '25 vs. Nov '25
(Nov '25: 68)



New Listings

2025

2024

2020-2023 Range

62

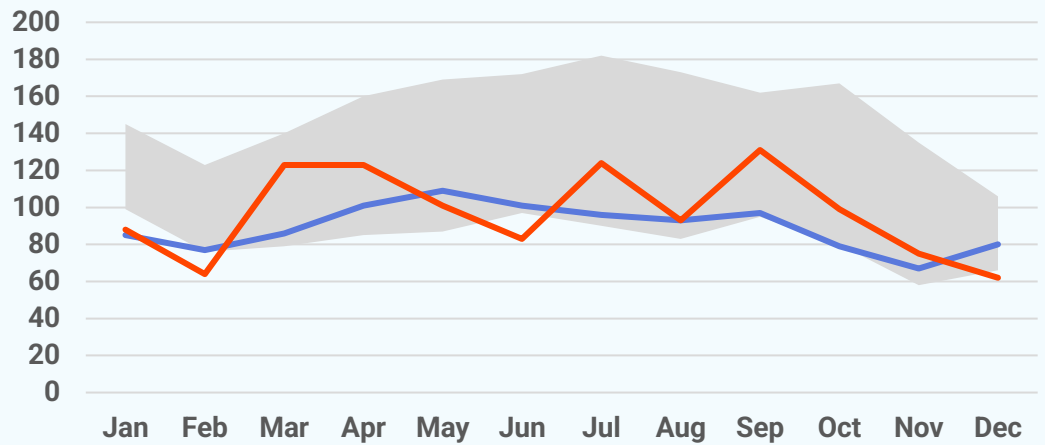
December 2025

-22.5%

Dec '25 vs. Dec '24
(Dec '24: 80)

-17.3%

Dec '25 vs. Nov '25
(Nov '25: 75)



Active Listings

184

December 2025

+49.6%

Dec '25 vs. Dec '24
(Dec '24: 123)

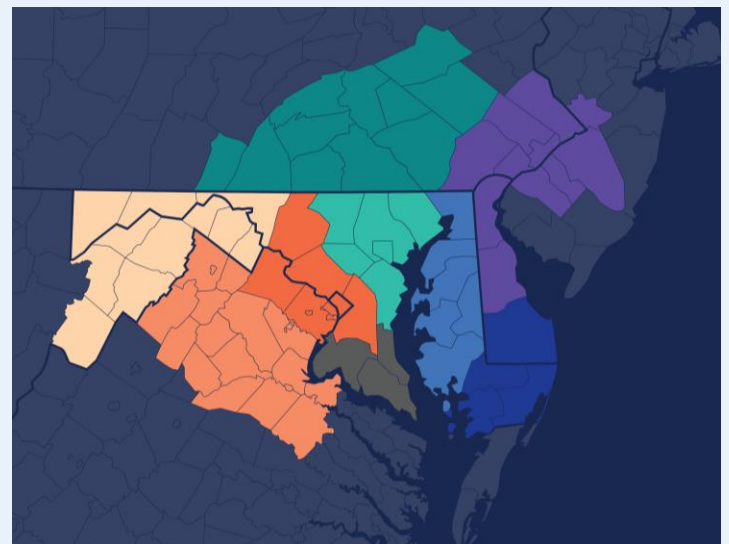
-1.6%

Dec '25 vs. Nov '25
(Nov '25: 187)



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December 2025 Condos Report

Prepared by Bright Research

Data as of January 7, 2025

Key Market Statistics	Dec 2025	Dec 2024	Change
Closed Sales	9	8	+12.5%
Median Sold Price	\$322,000	\$297,500	+8.2%
Median Days on Market	58 days	19 days	+39 days
New Pending Sales	6	13	-53.8%
New Listings	6	7	-14.3%
Active Listings	15	19	-21.1%
Months of Supply	1.67	1.73	-0.06 mos.

Closed Sales

2025

2024

2020-2023 Range

9

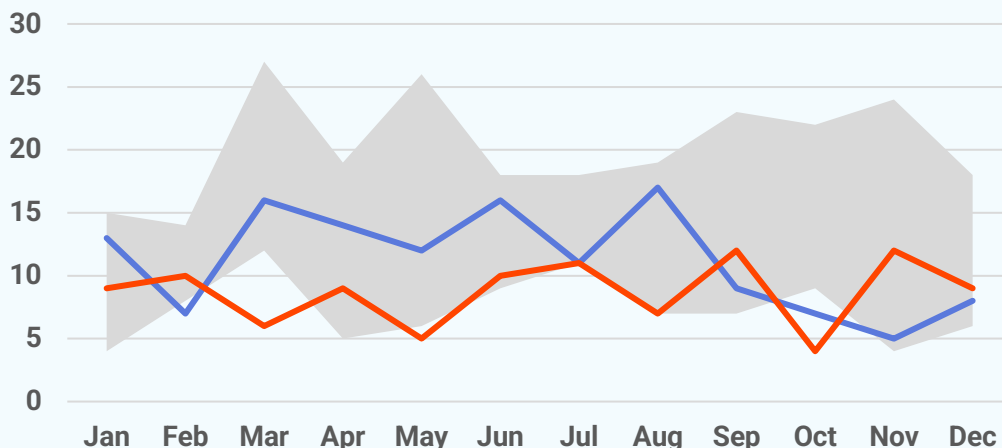
December 2025

+12.5%

Dec '25 vs. Dec '24
(Dec '24: 8)

-25.0%

Dec '25 vs. Nov '25
(Nov '25: 12)



Median Sold Price

2025 2024 2023 2022 2021 2020

\$322,000

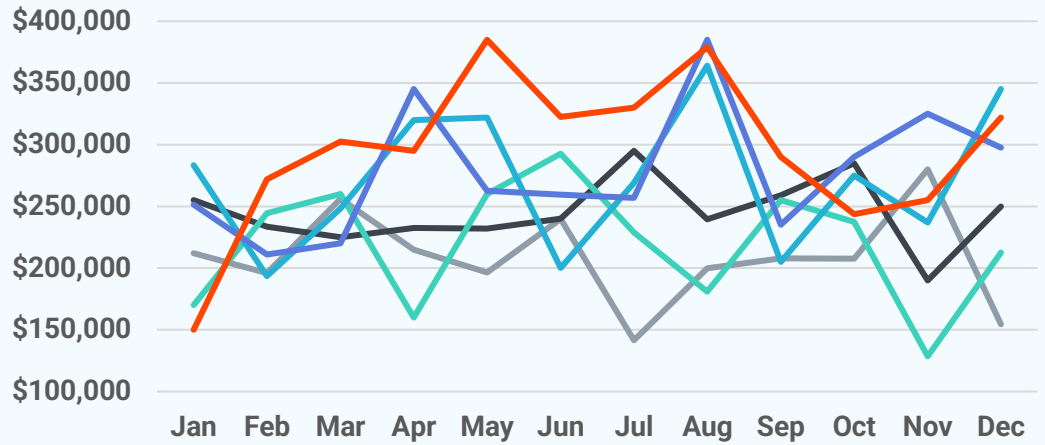
December 2025

+8.2%

Dec '25 vs. Dec '24
(Dec '24: \$297,500)

+26.3%

Dec '25 vs. Nov '25
(Nov '25: \$255,000)



Median Days on Market

58 days

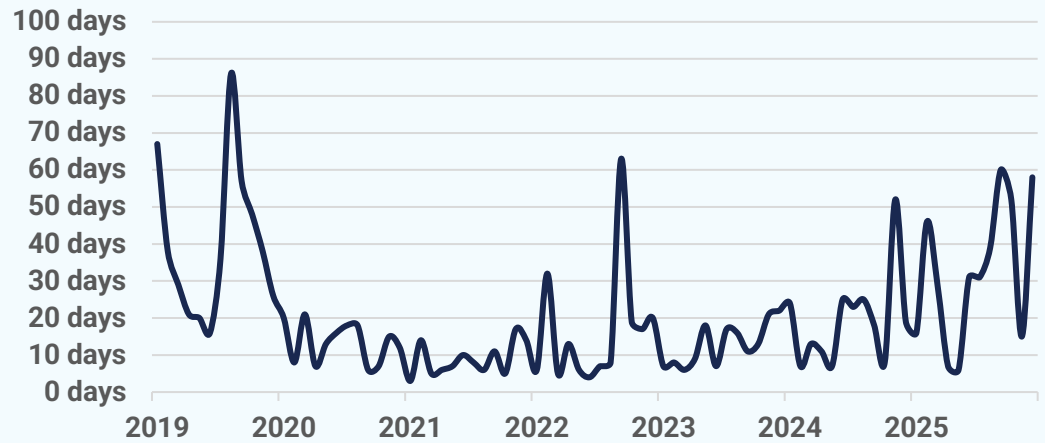
December 2025

+39 days

Dec '25 vs. Dec '24
(Dec '24: 19 days)

+43 days

Dec '25 vs. Nov '25
(Nov '25: 15 days)



New Pending Sales

2025 2024 2020-2023 Range

6

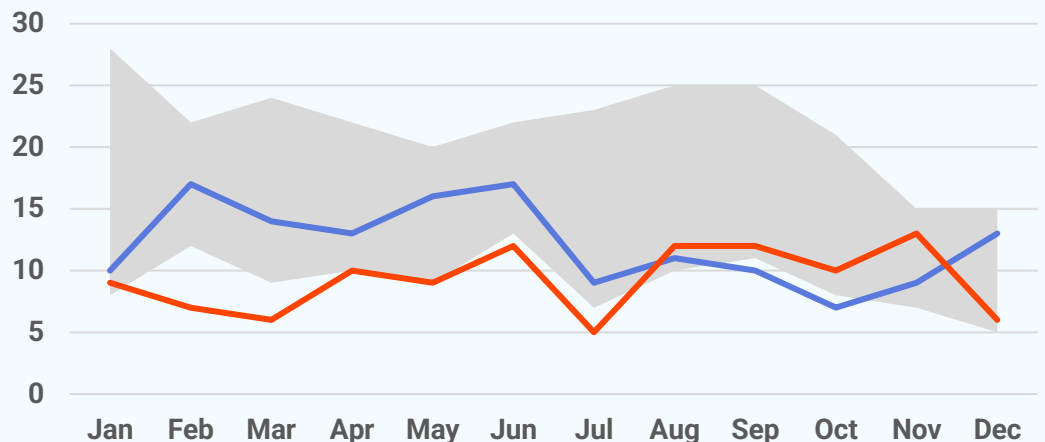
December 2025

-53.8%

Dec '25 vs. Dec '24
(Dec '24: 13)

-53.8%

Dec '25 vs. Nov '25
(Nov '25: 13)



New Listings

2025

2024

2020-2023 Range

6

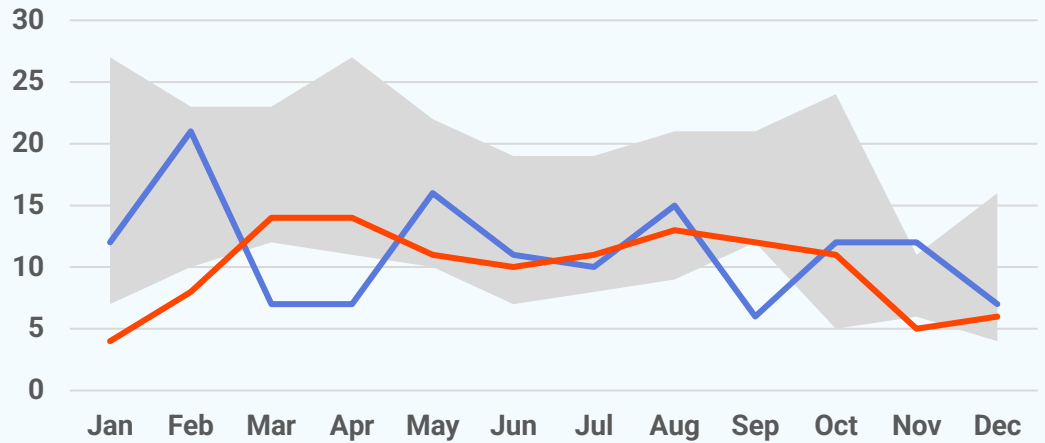
December 2025

-14.3%

Dec '25 vs. Dec '24
(Dec '24: 7)

+20.0%

Dec '25 vs. Nov '25
(Nov '25: 5)



Active Listings

15

December 2025

-21.1%

Dec '25 vs. Dec '24
(Dec '24: 19)

-16.7%

Dec '25 vs. Nov '25
(Nov '25: 18)



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