

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

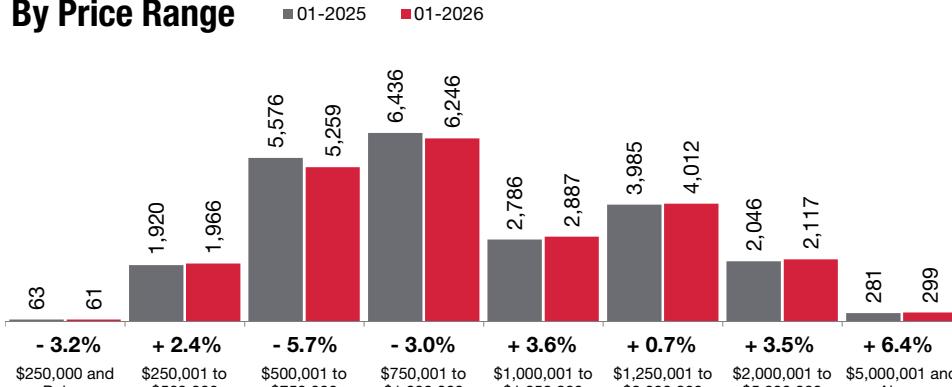
Residential real estate activity in San Diego County, comprised of single family properties, townhomes and condominiums. Percent changes are calculated using rounded figures.

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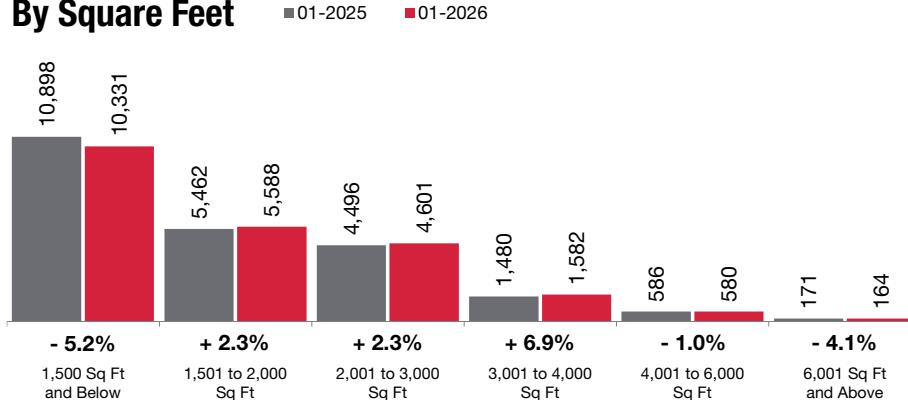
Pending Sales

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

By Price Range



By Square Feet



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	01-2025	01-2026	Change
34	22	- 35.3%	29	39	+ 34.5%
224	197	- 12.1%	1,696	1,769	+ 4.3%
2,194	2,051	- 6.5%	3,382	3,208	- 5.1%
4,745	4,764	+ 0.4%	1,691	1,482	- 12.4%
2,274	2,352	+ 3.4%	512	535	+ 4.5%
3,320	3,391	+ 2.1%	665	621	- 6.6%
1,783	1,814	+ 1.7%	263	303	+ 15.2%
274	287	+ 4.7%	7	12	+ 71.4%
14,848	14,878	+ 0.2%	8,245	7,969	- 3.3%

Condos - Townhomes

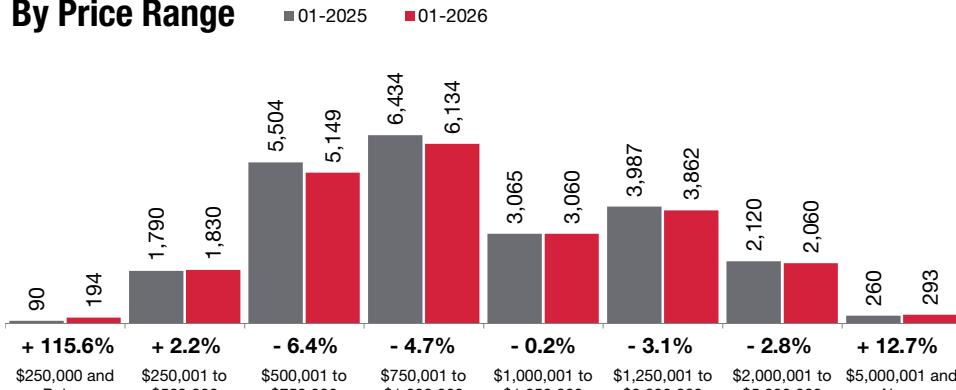
By Square Feet	01-2025	01-2026	Change
1,500 Sq Ft and Below	10,898	10,331	- 5.2%
1,501 to 2,000 Sq Ft	5,462	5,588	+ 2.3%
2,001 to 3,000 Sq Ft	4,496	4,601	+ 2.3%
3,001 to 4,000 Sq Ft	1,480	1,582	+ 6.9%
4,001 to 6,000 Sq Ft	586	580	- 1.0%
6,001 Sq Ft and Above	171	164	- 4.1%
All Square Footage	23,093	22,847	- 1.1%

01-2025	01-2026	Change	01-2025	01-2026	Change
4,591	4,326	- 5.8%	6,307	6,005	- 4.8%
3,949	4,075	+ 3.2%	1,513	1,513	0.0%
4,124	4,206	+ 2.0%	372	395	+ 6.2%
1,440	1,536	+ 6.7%	40	46	+ 15.0%
574	572	- 0.3%	12	8	- 33.3%
170	162	- 4.7%	1	2	+ 100.0%
14,848	14,878	+ 0.2%	8,245	7,969	- 3.3%

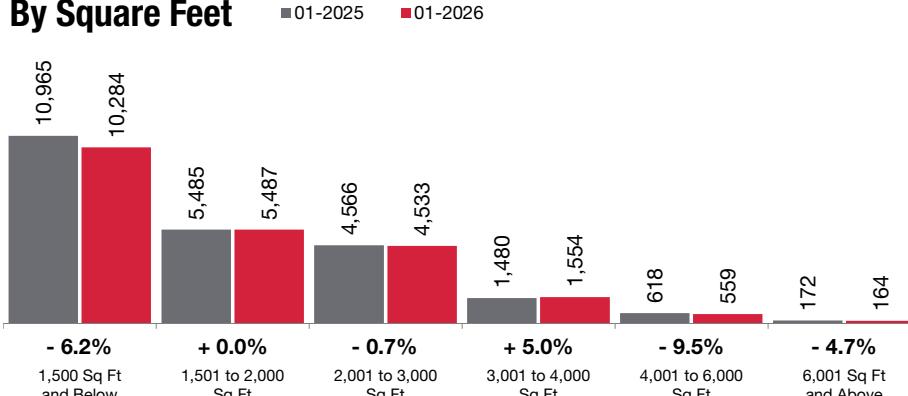
Closed Sales

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

By Price Range



By Square Feet



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	01-2025	01-2026	Change
46	93	+ 102.2%	44	101	+ 129.5%
203	190	- 6.4%	1,587	1,640	+ 3.3%
2,003	1,905	- 4.9%	3,501	3,244	- 7.3%
4,745	4,650	- 2.0%	1,689	1,484	- 12.1%
2,502	2,518	+ 0.6%	563	542	- 3.7%
3,323	3,260	- 1.9%	664	602	- 9.3%
1,848	1,776	- 3.9%	272	284	+ 4.4%
255	274	+ 7.5%	5	19	+ 280.0%
14,925	14,666	- 1.7%	8,325	7,916	- 4.9%

Condos - Townhomes

01-2025	01-2026	Change	01-2025	01-2026	Change
4,612	4,284	- 7.1%	6,353	6,000	- 5.6%
3,953	4,015	+ 1.6%	1,532	1,472	- 3.9%
4,147	4,140	- 0.2%	383	393	+ 2.6%
1,438	1,513	+ 5.2%	42	41	- 2.4%
604	551	- 8.8%	14	8	- 42.9%
171	162	- 5.3%	1	2	+ 100.0%
14,925	14,666	- 1.7%	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%
All Square Footage	23,250	22,582

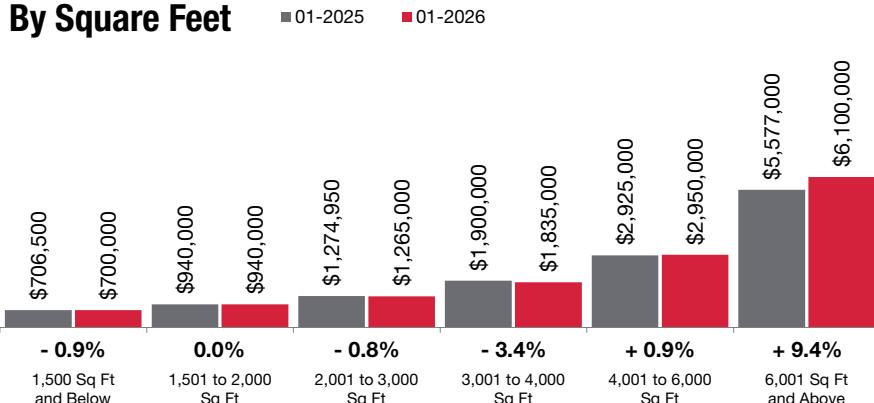
01-2025

01-2025	01-2026	Change	01-2025	01-2026	Change
4,612	4,284	- 7.1%	6,353	6,000	- 5.6%
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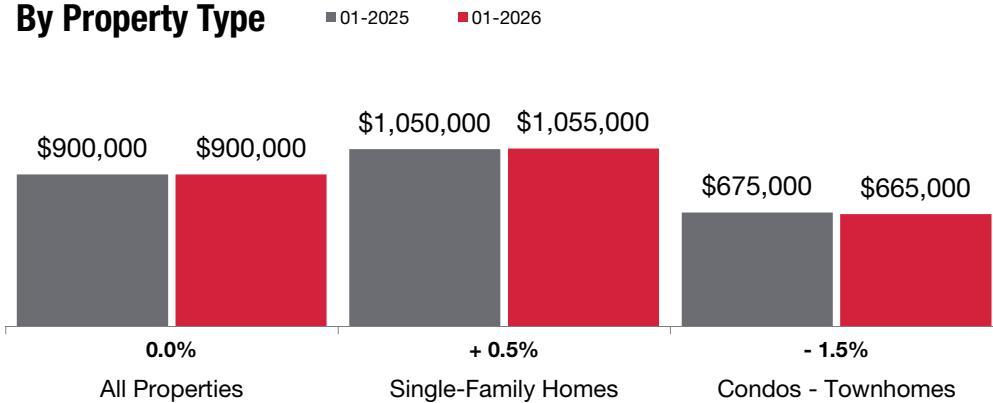
Median Sales Price

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.

By Square Feet



By Property Type



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%

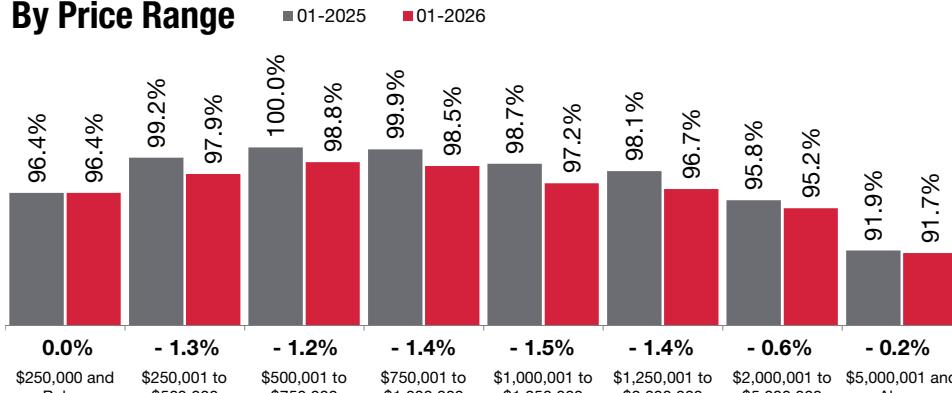
Single-Family Homes

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%

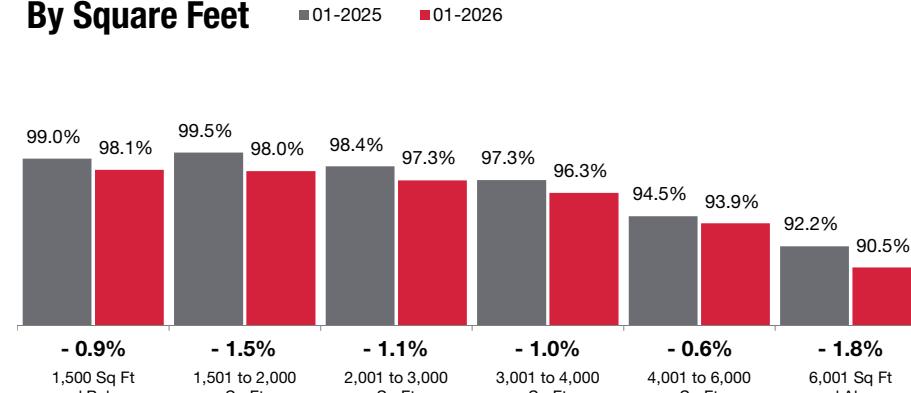
Percent of Original List Price Received

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



By Square Feet



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%

By Square Feet

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

01-2025	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%

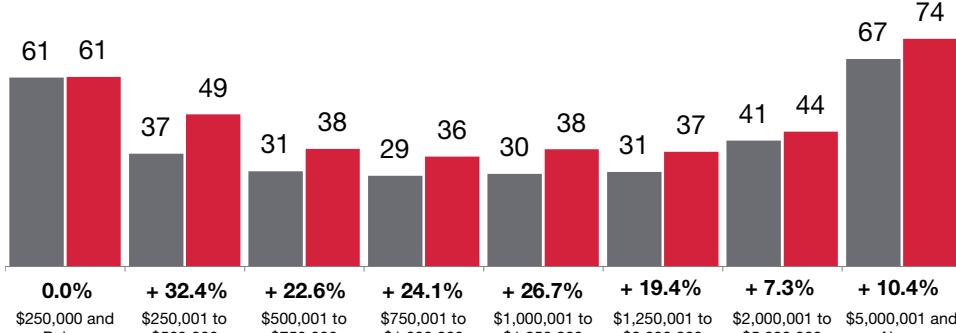
Days on Market Until Sale

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.

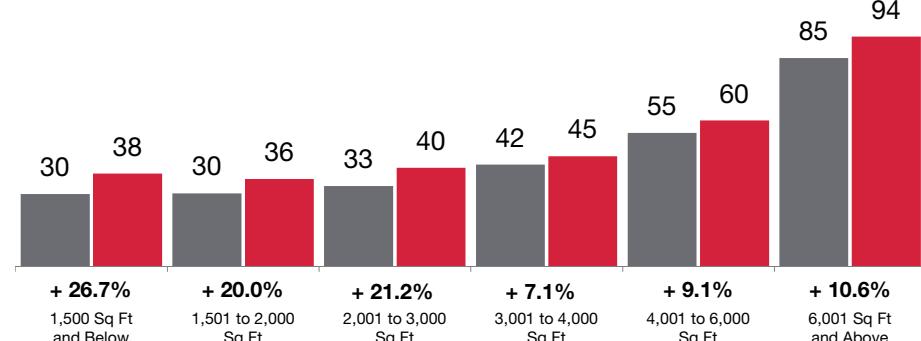
By Price Range

■ 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	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%

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%

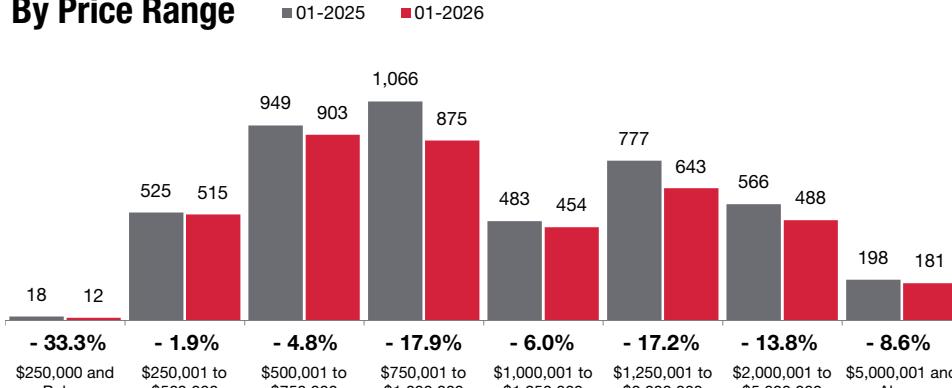
01-2025 01-2026 Change

01-2025	01-2026	Change	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%

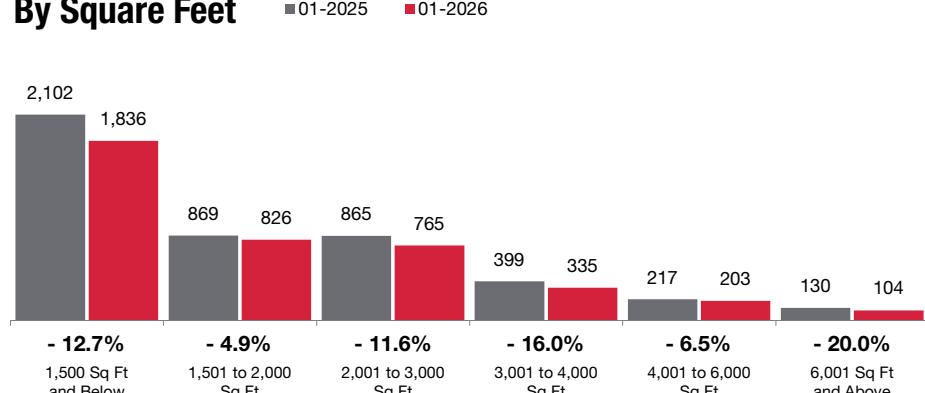
Inventory of Homes for Sale

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



By Square Feet



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

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%

By Square Feet

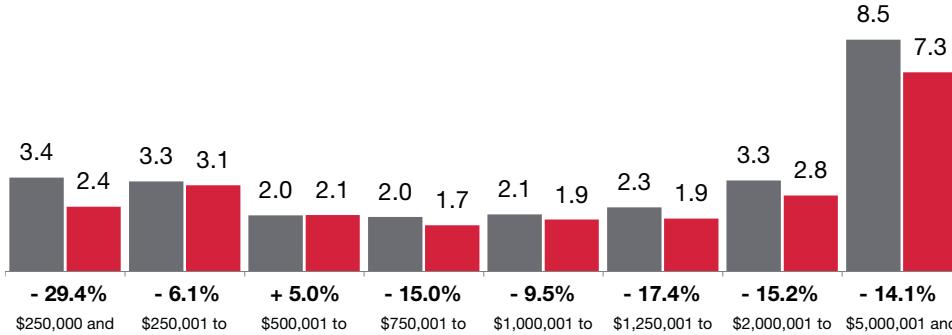
01-2025	01-2026	Change
2,102	1,836	-12.7%
869	826	-4.9%
865	765	-11.6%
399	335	-16.0%
217	203	-6.5%
130	104	-20.0%
All Square Footage	4,582	4,071
		-11.2%

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.

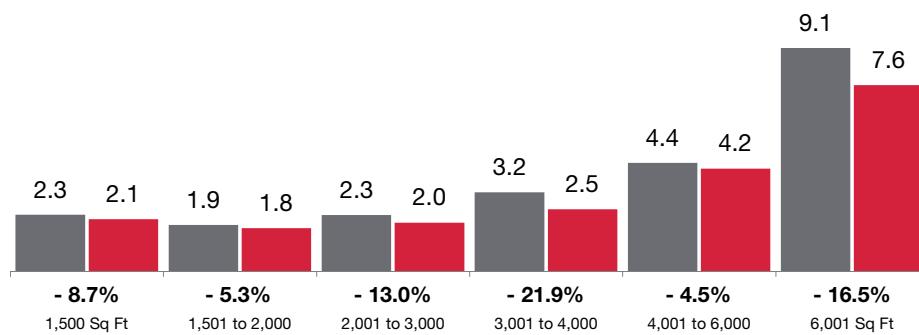
By Price Range

■ 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	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%

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	4.5	3.9	- 13.3%
6,001 Sq Ft and Above	9.1	7.6	- 16.5%
All Square Footage	2.4	2.1	- 12.5%

Condos - Townhomes

01-2025 01-2026 Change

01-2025	01-2026	Change	01-2025	01-2026	Change
2.7	2.6	- 3.7%	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%