

# Housing Supply Overview

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

## December 2025

U.S. pending home sales climbed to their highest level in nearly three years, rising 3.3% month-over-month, according to the National Association of REALTORS®. Economists polled by Reuters had forecast a 1.0% increase in contract signings. On a year-over-year basis, pending home sales advanced 2.6%, with both monthly and annual gains recorded across all four regions. For the 12-month period spanning January 2025 through December 2025, Pending Sales in the San Diego were down 1.3 percent overall. The price range with the largest gain in sales was the \$5,000,001 and Above range, where they increased 5.6 percent.

The overall Median Sales Price was up 0.3 percent to \$900,000. The property type with the largest price gain was the Single-Family Homes segment, where prices remained flat at \$1,050,500. The price range that tended to sell the quickest was the \$1,250,001 to \$2,000,000 range at 37 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 50.6 percent. The property type with the smallest decline was the Condos - Townhomes segment, where they decreased 44.5 percent. That amounts to 0.8 months supply for Single-Family homes and 1.3 months supply for Condos.

## Quick Facts

+ 5.6%

+ 6.7%

- 0.0%

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

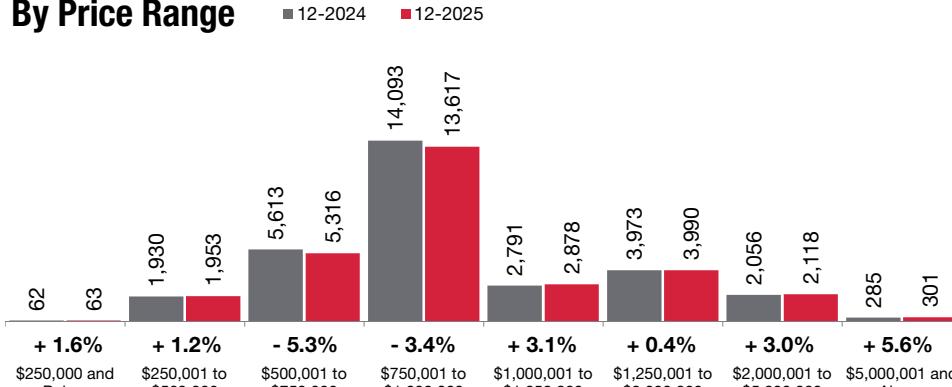
Residential real estate activity in San Diego County, comprised of single family properties, townhomes and condominiums. Percent changes are calculated using rounded figures.

Pending Sales	2
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Months Supply of Inventory	8

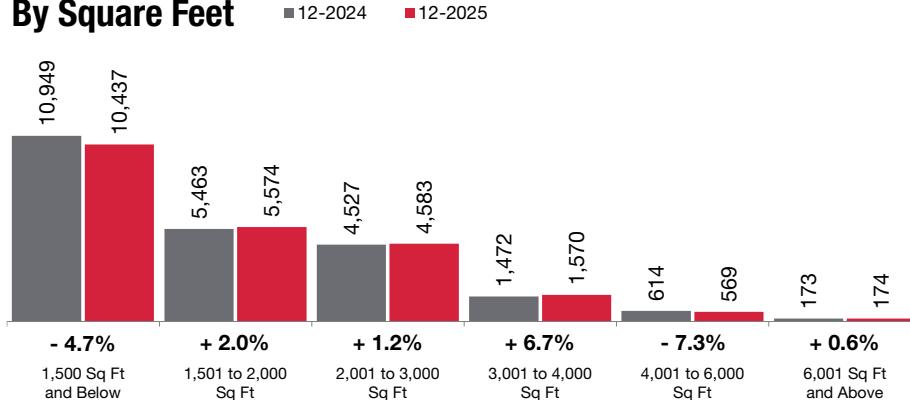
# Pending Sales

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	12-2024	12-2025	Change
\$250,000 and Below	62	63	+ 1.6%
\$250,001 to \$500,000	1,930	1,953	+ 1.2%
\$500,001 to \$750,000	5,613	5,316	- 5.3%
\$750,001 to \$1,000,000	14,093	13,617	- 3.4%
\$1,000,001 to \$1,250,000	2,791	2,878	+ 3.1%
\$1,250,001 to \$2,000,000	3,973	3,990	+ 0.4%
\$2,000,001 to \$5,000,000	2,056	2,118	+ 3.0%
\$5,000,001 and Above	285	301	+ 5.6%
All Price Ranges	23,198	22,907	- 1.3%

## Single-Family Homes

12-2024	12-2025	Change	12-2024	12-2025	Change
33	23	- 30.3%	29	40	+ 37.9%
215	196	- 8.8%	1,715	1,757	+ 2.4%
2,203	2,082	- 5.5%	3,410	3,234	- 5.2%
7,242	7,071	- 2.4%	6,851	6,546	- 4.5%
2,276	2,341	+ 2.9%	515	537	+ 4.3%
3,301	3,364	+ 1.9%	672	626	- 6.8%
1,791	1,814	+ 1.3%	265	304	+ 14.7%
277	288	+ 4.0%	8	13	+ 62.5%
14,887	14,880	- 0.0%	8,311	8,027	- 3.4%

## Condos - Townhomes

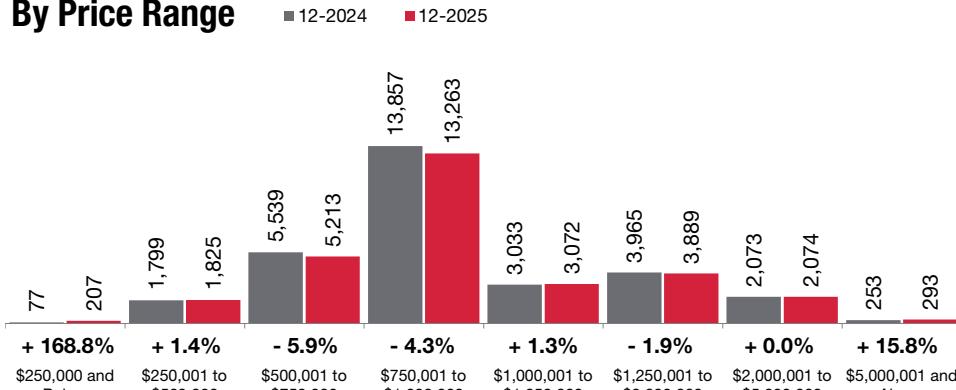
By Square Feet	12-2024	12-2025	Change
1,500 Sq Ft and Below	10,949	10,437	- 4.7%
1,501 to 2,000 Sq Ft	5,463	5,574	+ 2.0%
2,001 to 3,000 Sq Ft	4,527	4,583	+ 1.2%
3,001 to 4,000 Sq Ft	1,472	1,570	+ 6.7%
4,001 to 6,000 Sq Ft	614	569	- 7.3%
6,001 Sq Ft and Above	173	174	+ 0.6%
All Square Footage	23,198	22,907	- 1.3%

12-2024	12-2025	Change	12-2024	12-2025	Change
4,596	4,355	- 5.2%	6,353	6,082	- 4.3%
3,939	4,077	+ 3.5%	1,524	1,497	- 1.8%
4,149	4,189	+ 1.0%	378	394	+ 4.2%
1,430	1,527	+ 6.8%	42	43	+ 2.4%
601	560	- 6.8%	13	9	- 30.8%
172	172	0.0%	1	2	+ 100.0%
14,887	14,880	- 0.0%	8,311	8,027	- 3.4%

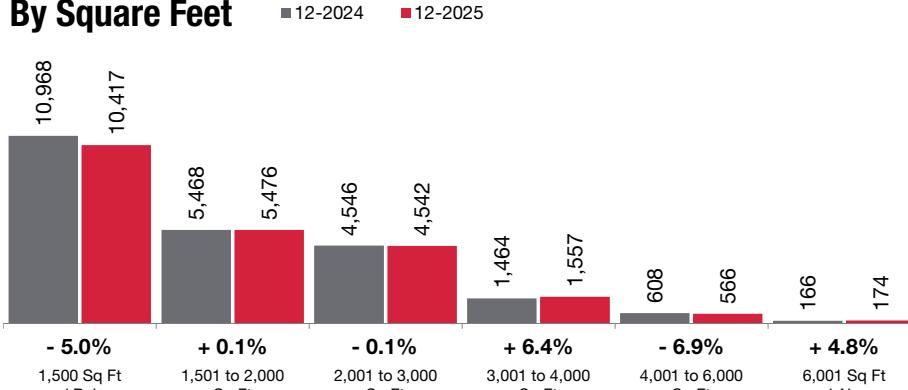
# Closed Sales

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	12-2024	12-2025	Change
\$250,000 and Below	77	207	+ 168.8%
\$250,001 to \$500,000	1,799	1,825	+ 1.4%
\$500,001 to \$750,000	5,539	5,213	- 5.9%
\$750,001 to \$1,000,000	13,857	13,263	- 4.3%
\$1,000,001 to \$1,250,000	3,033	3,072	+ 1.3%
\$1,250,001 to \$2,000,000	3,965	3,889	- 1.9%
\$2,000,001 to \$5,000,000	2,073	2,074	+ 0.0%
\$5,000,001 and Above	253	293	+ 15.8%
All Price Ranges	23,183	22,732	- 1.9%

## Single-Family Homes

12-2024	12-2025	Change	12-2024	12-2025	Change
39	100	+ 156.4%	38	107	+ 181.6%
200	193	- 3.5%	1,599	1,632	+ 2.1%
2,040	1,920	- 5.9%	3,499	3,293	- 5.9%
7,020	6,801	- 3.1%	6,837	6,462	- 5.5%
2,474	2,525	+ 2.1%	559	547	- 2.1%
3,304	3,272	- 1.0%	661	617	- 6.7%
1,811	1,787	- 1.3%	262	287	+ 9.5%
247	275	+ 11.3%	6	18	+ 200.0%
14,857	14,736	- 0.8%	8,326	7,996	- 4.0%

## Condos - Townhomes

12-2024	12-2025	Change	12-2024	12-2025	Change
4,603	4,343	- 5.6%	6,365	6,074	- 4.6%
3,945	3,998	+ 1.3%	1,523	1,478	- 3.0%
4,129	4,148	+ 0.5%	380	394	+ 3.7%
1,419	1,519	+ 7.0%	45	38	- 15.6%
596	556	- 6.7%	12	10	- 16.7%
165	172	+ 4.2%	1	2	+ 100.0%
14,857	14,736	- 0.8%	8,326	7,996	- 4.0%

## By Square Feet

12-2024	12-2025	Change
10,968	10,417	- 5.0%
5,468	5,476	+ 0.1%
4,546	4,542	- 0.1%
1,464	1,557	+ 6.4%
608	566	- 6.9%
166	174	+ 4.8%
23,183	22,732	- 1.9%

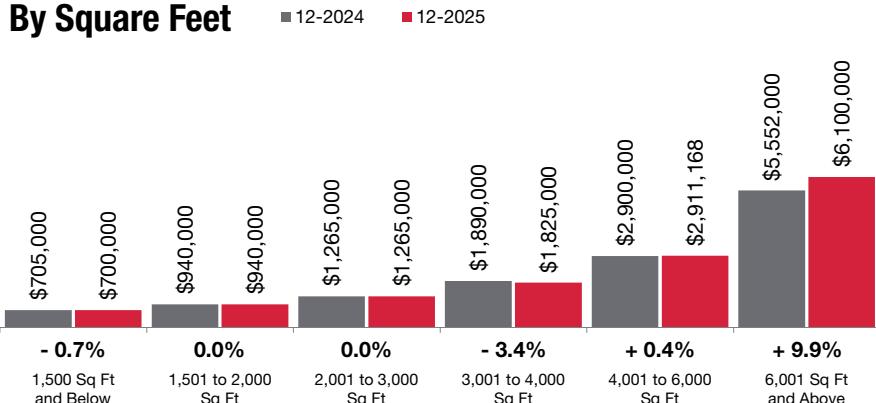
## 12-2024

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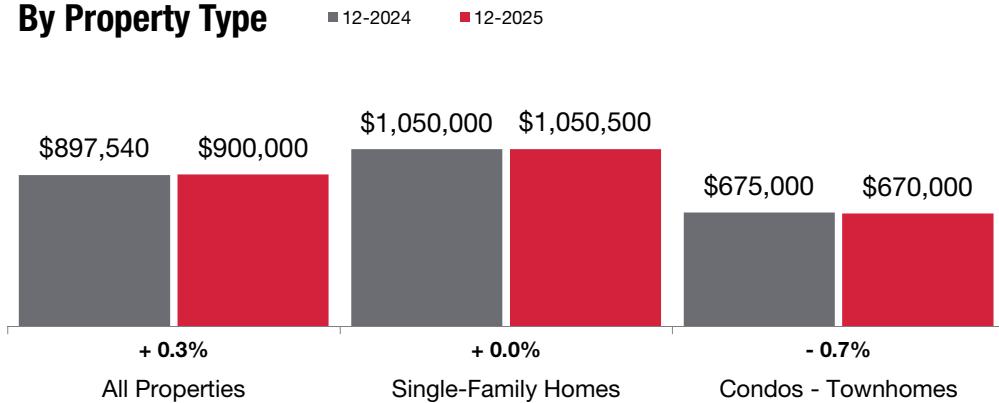
# Median Sales Price

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	12-2024	12-2025	Change
1,500 Sq Ft and Below	\$705,000	\$700,000	- 0.7%
1,501 to 2,000 Sq Ft	\$940,000	\$940,000	0.0%
2,001 to 3,000 Sq Ft	\$1,265,000	\$1,265,000	0.0%
3,001 to 4,000 Sq Ft	\$1,890,000	\$1,825,000	- 3.4%
4,001 to 6,000 Sq Ft	\$2,900,000	\$2,911,168	+ 0.4%
6,001 Sq Ft and Above	\$5,552,000	\$6,100,000	+ 9.9%
All Square Footage	\$897,540	\$900,000	+ 0.3%

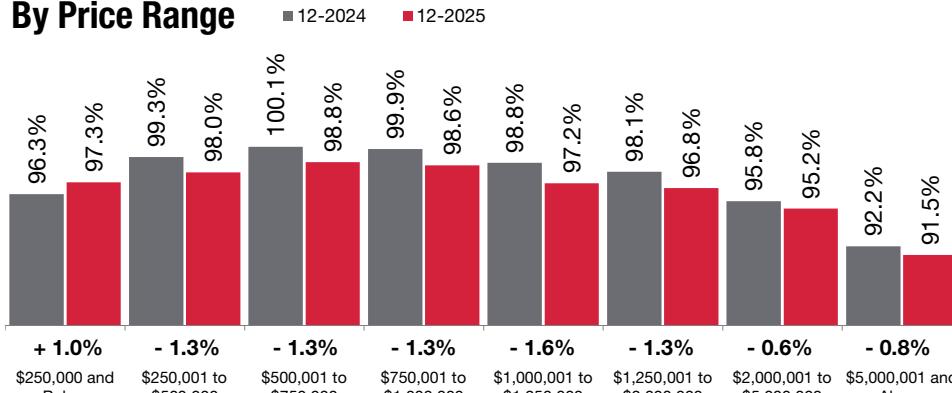
## Single-Family Homes

12-2024	12-2025	Change	12-2024	12-2025	Change
\$799,000	\$800,000	+ 0.1%	\$610,000	\$600,000	- 1.6%
\$950,000	\$950,000	0.0%	\$899,990	\$902,500	+ 0.3%
\$1,250,000	\$1,250,000	0.0%	\$1,497,500	\$1,550,000	+ 3.5%
\$1,877,500	\$1,800,000	- 4.1%	\$2,360,000	\$2,225,000	- 5.7%
\$2,890,000	\$2,900,000	+ 0.3%	\$3,930,000	\$3,424,500	- 12.9%
\$5,554,000	\$6,100,000	+ 9.8%	\$2,250,000	\$3,690,550	+ 64.0%
\$1,050,000	\$1,050,500	+ 0.0%	\$675,000	\$670,000	- 0.7%

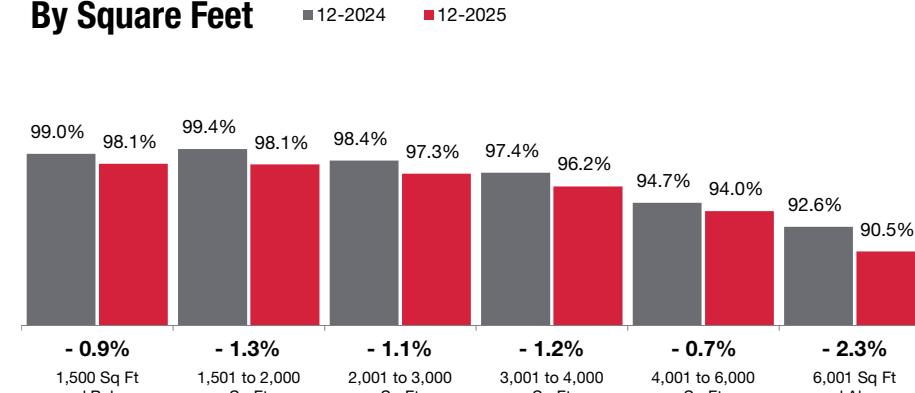
# Percent of Original List Price Received

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



## By Square Feet



## All Properties

By Price Range	12-2024	12-2025	Change
\$250,000 and Below	96.3%	97.3%	+ 1.0%
\$250,001 to \$500,000	99.3%	98.0%	- 1.3%
\$500,001 to \$750,000	100.1%	98.8%	- 1.3%
\$750,001 to \$1,000,000	99.9%	98.6%	- 1.3%
\$1,000,001 to \$1,250,000	98.8%	97.2%	- 1.6%
\$1,250,001 to \$2,000,000	98.1%	96.8%	- 1.3%
\$2,000,001 to \$5,000,000	95.8%	95.2%	- 0.6%
\$5,000,001 and Above	92.2%	91.5%	- 0.8%
All Price Ranges	99.0%	97.7%	- 1.3%

## Single-Family Homes

12-2024	12-2025	Change	12-2024	12-2025	Change
94.1%	93.9%	- 0.2%	99.0%	99.6%	+ 0.6%
100.8%	98.6%	- 2.2%	99.0%	98.0%	- 1.0%
101.1%	100.2%	- 0.9%	99.4%	98.0%	- 1.4%
100.5%	99.3%	- 1.2%	99.2%	97.9%	- 1.3%
99.0%	97.4%	- 1.6%	97.8%	96.3%	- 1.5%
98.3%	96.9%	- 1.4%	96.9%	96.1%	- 0.8%
96.0%	95.3%	- 0.7%	94.5%	94.7%	+ 0.2%
92.4%	91.4%	- 1.1%	87.6%	95.1%	+ 8.6%
99.1%	97.7%	- 1.4%	98.8%	97.5%	- 1.3%

## By Square Feet

By Square Feet	12-2024	12-2025	Change
1,500 Sq Ft and Below	99.0%	98.1%	- 0.9%
1,501 to 2,000 Sq Ft	99.4%	98.1%	- 1.3%
2,001 to 3,000 Sq Ft	98.4%	97.3%	- 1.1%
3,001 to 4,000 Sq Ft	97.4%	96.2%	- 1.2%
4,001 to 6,000 Sq Ft	94.7%	94.0%	- 0.7%
6,001 Sq Ft and Above	92.6%	90.5%	- 2.3%
All Square Footage	99.0%	97.7%	- 1.3%

## 12-2024

12-2024	12-2025	Change	12-2024	12-2025	Change
100.3%	98.9%	- 1.4%	98.9%	97.6%	- 1.3%
99.7%	98.4%	- 1.3%	98.7%	97.3%	- 1.4%
98.5%	97.3%	- 1.2%	97.3%	96.9%	- 0.4%
97.5%	96.2%	- 1.3%	92.4%	93.6%	+ 1.3%
94.8%	94.1%	- 0.7%	91.3%	90.7%	- 0.7%
92.7%	90.4%	- 2.5%	77.6%	93.4%	+ 20.4%
99.1%	97.7%	- 1.4%	98.8%	97.5%	- 1.3%

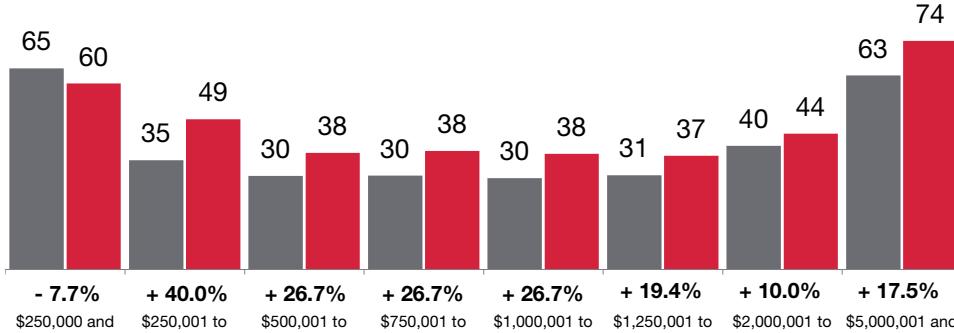
# Days on Market Until Sale

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.

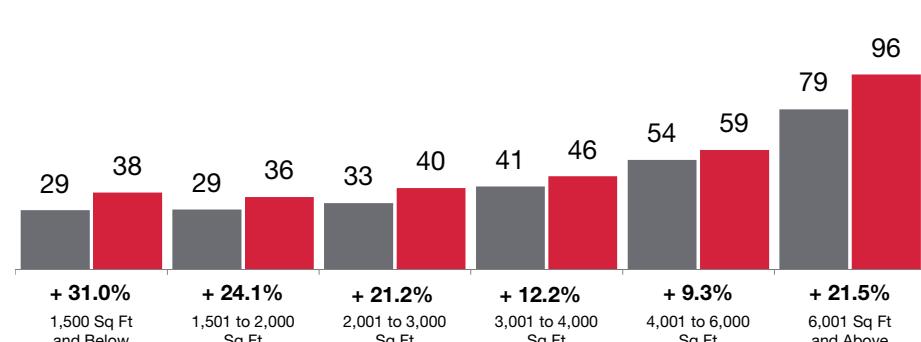
## By Price Range

■ 12-2024 ■ 12-2025



## By Square Feet

■ 12-2024 ■ 12-2025



## All Properties

### By Price Range

12-2024 12-2025 Change

\$250,000 and Below	65	60	- 7.7%
\$250,001 to \$500,000	35	49	+ 40.0%
\$500,001 to \$750,000	30	38	+ 26.7%
\$750,001 to \$1,000,000	30	38	+ 26.7%
\$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	40	44	+ 10.0%
\$5,000,001 and Above	63	74	+ 17.5%
<b>All Price Ranges</b>	<b>32</b>	<b>39</b>	<b>+ 21.9%</b>

## Single-Family Homes

12-2024 12-2025 Change

12-2024	12-2025	Change	12-2024	12-2025	Change
69	55	- 20.3%	62	65	+ 4.8%
41	58	+ 41.5%	35	48	+ 37.1%
30	35	+ 16.7%	31	39	+ 25.8%
29	35	+ 20.7%	32	42	+ 31.3%
29	37	+ 27.6%	33	40	+ 21.2%
30	36	+ 20.0%	33	41	+ 24.2%
39	43	+ 10.3%	50	51	+ 2.0%
63	75	+ 19.0%	58	57	- 1.7%
<b>31</b>	<b>38</b>	<b>+ 22.6%</b>	<b>33</b>	<b>42</b>	<b>+ 27.3%</b>

## Condos - Townhomes

### By Square Feet

12-2024 12-2025 Change

1,500 Sq Ft and Below	29	38	+ 31.0%
1,501 to 2,000 Sq Ft	29	36	+ 24.1%
2,001 to 3,000 Sq Ft	33	40	+ 21.2%
3,001 to 4,000 Sq Ft	41	46	+ 12.2%
4,001 to 6,000 Sq Ft	54	59	+ 9.3%
6,001 Sq Ft and Above	79	96	+ 21.5%
<b>All Square Footage</b>	<b>32</b>	<b>39</b>	<b>+ 21.9%</b>

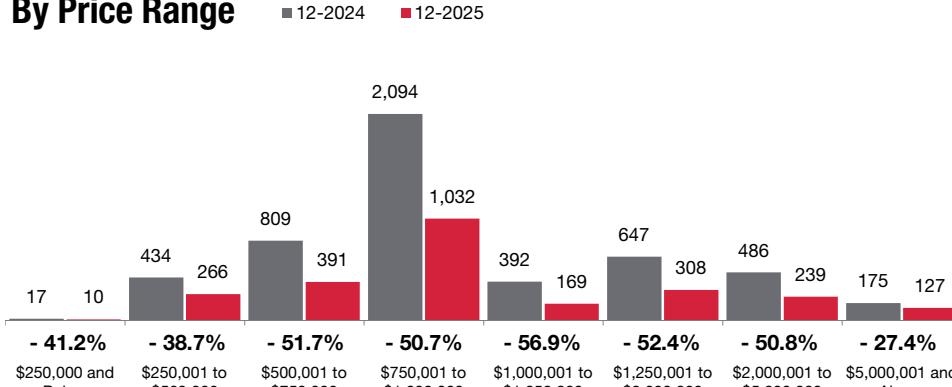
12-2024 12-2025 Change

12-2024	12-2025	Change	12-2024	12-2025	Change
26	32	+ 23.1%	31	42	+ 35.5%
27	33	+ 22.2%	35	43	+ 22.9%
32	39	+ 21.9%	39	46	+ 17.9%
40	46	+ 15.0%	58	48	- 17.2%
53	59	+ 11.3%	82	60	- 26.8%
78	96	+ 23.1%	142	91	- 35.9%
<b>31</b>	<b>38</b>	<b>+ 22.6%</b>	<b>33</b>	<b>42</b>	<b>+ 27.3%</b>

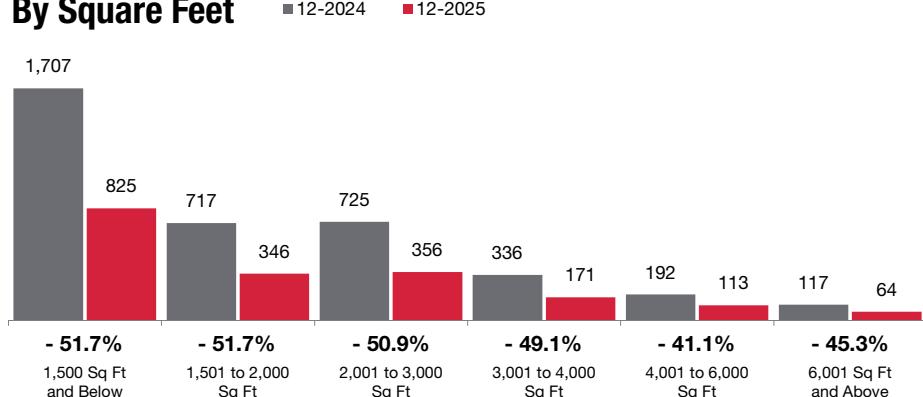
# Inventory of Homes for Sale

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	12-2024	12-2025	Change
\$250,000 and Below	17	10	-41.2%
\$250,001 to \$500,000	434	266	-38.7%
\$500,001 to \$750,000	809	391	-51.7%
\$750,001 to \$1,000,000	2,094	1,032	-50.7%
\$1,000,001 to \$1,250,000	392	169	-56.9%
\$1,250,001 to \$2,000,000	647	308	-52.4%
\$2,000,001 to \$5,000,000	486	239	-50.8%
\$5,000,001 and Above	175	127	-27.4%
<b>All Price Ranges</b>	<b>3,794</b>	<b>1,876</b>	<b>-50.6%</b>

## Single-Family Homes

12-2024	12-2025	Change	12-2024	12-2025	Change
5	2	-60.0%	12	8	-33.3%
60	35	-41.7%	374	231	-38.2%
241	86	-64.3%	568	305	-46.3%
872	358	-58.9%	1,222	674	-44.8%
304	121	-60.2%	88	48	-45.5%
521	233	-55.3%	126	75	-40.5%
396	194	-51.0%	90	45	-50.0%
172	121	-29.7%	3	6	+100.0%
<b>2,265</b>	<b>1,027</b>	<b>-54.7%</b>	<b>1,529</b>	<b>849</b>	<b>-44.5%</b>

## Condos - Townhomes

12-2024	12-2025	Change	12-2024	12-2025	Change
532	190	-64.3%	1,175	635	-46.0%
463	200	-56.8%	254	146	-42.5%
640	305	-52.3%	85	51	-40.0%
327	161	-50.8%	9	10	+11.1%
187	107	-42.8%	5	6	+20.0%
116	63	-45.7%	1	1	0.0%
<b>2,265</b>	<b>1,027</b>	<b>-54.7%</b>	<b>1,529</b>	<b>849</b>	<b>-44.5%</b>

## By Square Feet

By Square Feet	12-2024	12-2025	Change
1,500 Sq Ft and Below	1,707	825	-51.7%
1,501 to 2,000 Sq Ft	717	346	-51.7%
2,001 to 3,000 Sq Ft	725	356	-50.9%
3,001 to 4,000 Sq Ft	336	171	-49.1%
4,001 to 6,000 Sq Ft	192	113	-41.1%
6,001 Sq Ft and Above	117	64	-45.3%
<b>All Square Footage</b>	<b>3,794</b>	<b>1,876</b>	<b>-50.6%</b>

## Condos - Townhomes

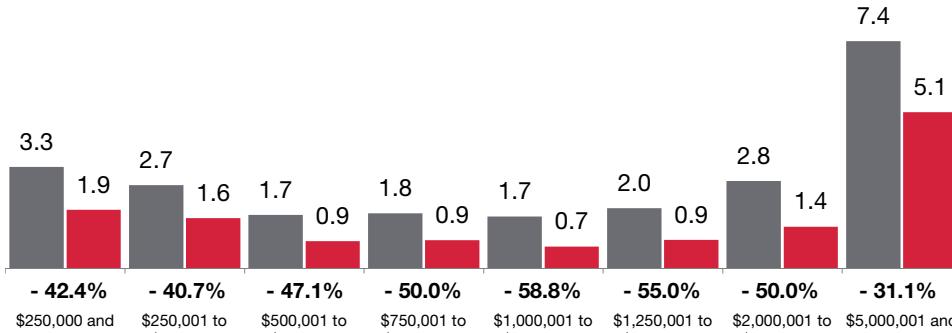
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<b>2,265</b>	<b>1,027</b>	<b>-54.7%</b>	<b>1,529</b>	<b>849</b>	<b>-44.5%</b>

# 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.

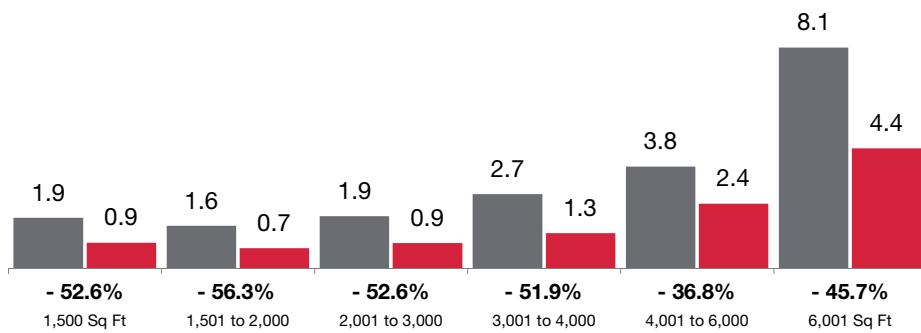
## By Price Range

■ 12-2024 ■ 12-2025



## By Square Feet

■ 12-2024 ■ 12-2025



## All Properties

### By Price Range

12-2024 12-2025 Change

\$250,000 and Below	3.3	1.9	- 42.4%
\$250,001 to \$500,000	2.7	1.6	- 40.7%
\$500,001 to \$750,000	1.7	0.9	- 47.1%
\$750,001 to \$1,000,000	1.8	0.9	- 50.0%
\$1,000,001 to \$1,250,000	1.7	0.7	- 58.8%
\$1,250,001 to \$2,000,000	2.0	0.9	- 55.0%
\$2,000,001 to \$5,000,000	2.8	1.4	- 50.0%
\$5,000,001 and Above	7.4	5.1	- 31.1%
All Price Ranges	2.0	1.0	- 50.0%

## Single-Family Homes

### 12-2024 12-2025 Change

12-2024	12-2025	Change	12-2024	12-2025	Change
1.8	0.9	- 50.0%	4.6	2.4	- 47.8%
3.3	2.1	- 36.4%	2.6	1.6	- 38.5%
1.3	0.5	- 61.5%	2.0	1.1	- 45.0%
1.4	0.6	- 57.1%	2.1	1.2	- 42.9%
1.6	0.6	- 62.5%	2.1	1.1	- 47.6%
1.9	0.8	- 57.9%	2.3	1.4	- 39.1%
2.7	1.3	- 51.9%	4.1	1.8	- 56.1%
7.5	5.0	- 33.3%	1.9	4.2	+ 121.1%
1.8	0.8	- 55.6%	2.2	1.3	- 40.9%

### By Square Feet

12-2024 12-2025 Change

1,500 Sq Ft and Below	1.9	0.9	- 52.6%
1,501 to 2,000 Sq Ft	1.6	0.7	- 56.3%
2,001 to 3,000 Sq Ft	1.9	0.9	- 52.6%
3,001 to 4,000 Sq Ft	2.7	1.3	- 51.9%
4,001 to 6,000 Sq Ft	3.8	2.4	- 36.8%
6,001 Sq Ft and Above	8.1	4.4	- 45.7%
All Square Footage	2.0	1.0	- 50.0%

### 12-2024 12-2025 Change

12-2024	12-2025	Change	12-2024	12-2025	Change
1.4	0.5	- 64.3%	2.2	1.3	- 40.9%
1.4	0.6	- 57.1%	2.0	1.2	- 40.0%
1.9	0.9	- 52.6%	2.7	1.6	- 40.7%
2.7	1.3	- 51.9%	2.4	2.3	- 4.2%
3.7	2.3	- 37.8%	3.1	4.7	+ 51.6%
8.1	4.4	- 45.7%	1.0	1.0	0.0%
1.8	0.8	- 55.6%	2.2	1.3	- 40.9%