

# Housing Supply Overview

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

## November 2025

Nationally, pending home sales rose 1.9% month-over-month, driven by gains in the Northeast, Midwest, and South, according to the National Association of REALTORS®. Economists polled by Reuters had forecast a 0.5% increase for the month. Year-over-year, pending sales were down 0.4%, with the Midwest and South reporting increases, while the Northeast and West experienced declines. For the 12-month period spanning December 2024 through November 2025, Pending Sales in the San Diego were down 0.9 percent overall. The price range with the largest gain in sales was the \$5,000,001 and Above range, where they increased 8.2 percent.

The overall Median Sales Price was up 0.6 percent to \$900,000. The property type with the largest price gain was the Single-Family Homes segment, where prices increased 0.5 percent to \$1,050,000. The price range that tended to sell the quickest was the \$1,250,001 to \$2,000,000 range at 36 days; the price range that tended to sell the slowest was the \$5,000,001 and Above range at 75 days.

Market-wide, inventory levels were down 0.1 percent. However, the property type with the largest gain was the Condos - Townhomes segment, where they increased 8.9 percent. That amounts to 2.2 months supply for Single-Family homes and 3.0 months supply for Condos.

## Quick Facts

+ 8.2%	+ 5.5%	+ 0.1%
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.

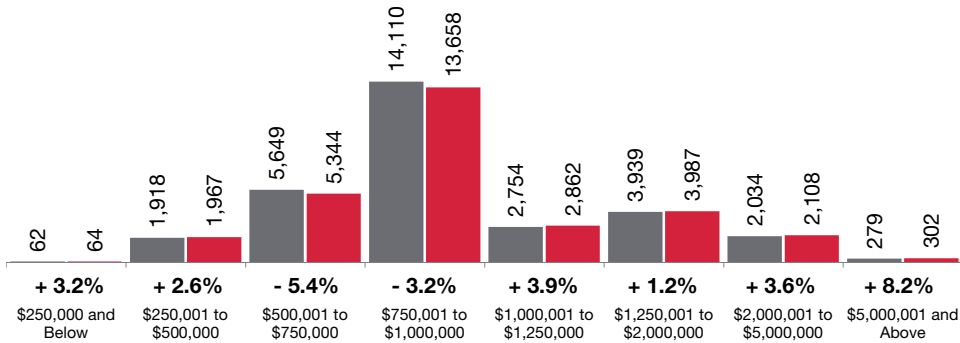
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# Pending Sales

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

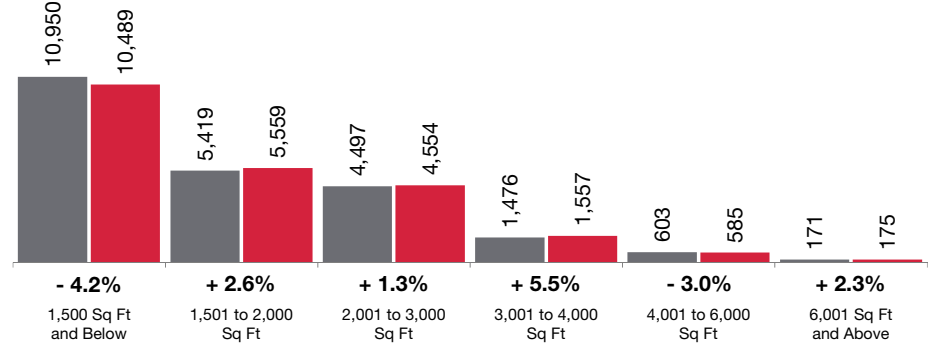
## By Price Range

■ 11-2024 ■ 11-2025



## By Square Feet

■ 11-2024 ■ 11-2025



## All Properties

By Price Range	11-2024	11-2025	Change
\$250,000 and Below	62	64	+ 3.2%
\$250,001 to \$500,000	1,918	1,967	+ 2.6%
\$500,001 to \$750,000	5,649	5,344	- 5.4%
\$750,001 to \$1,000,000	14,110	13,658	- 3.2%
\$1,000,001 to \$1,250,000	2,754	2,862	+ 3.9%
\$1,250,001 to \$2,000,000	3,939	3,987	+ 1.2%
\$2,000,001 to \$5,000,000	2,034	2,108	+ 3.6%
\$5,000,001 and Above	279	302	+ 8.2%
All Price Ranges	23,116	22,919	- 0.9%

## Single-Family Homes

11-2024	11-2025	Change	11-2024	11-2025	Change
34	23	- 32.4%	28	41	+ 46.4%
212	199	- 6.1%	1,706	1,768	+ 3.6%
2,231	2,084	- 6.6%	3,418	3,260	- 4.6%
7,275	7,056	- 3.0%	6,835	6,602	- 3.4%
2,244	2,328	+ 3.7%	510	534	+ 4.7%
3,273	3,351	+ 2.4%	666	636	- 4.5%
1,764	1,815	+ 2.9%	270	293	+ 8.5%
271	289	+ 6.6%	8	13	+ 62.5%
14,827	14,840	+ 0.1%	8,289	8,079	- 2.5%

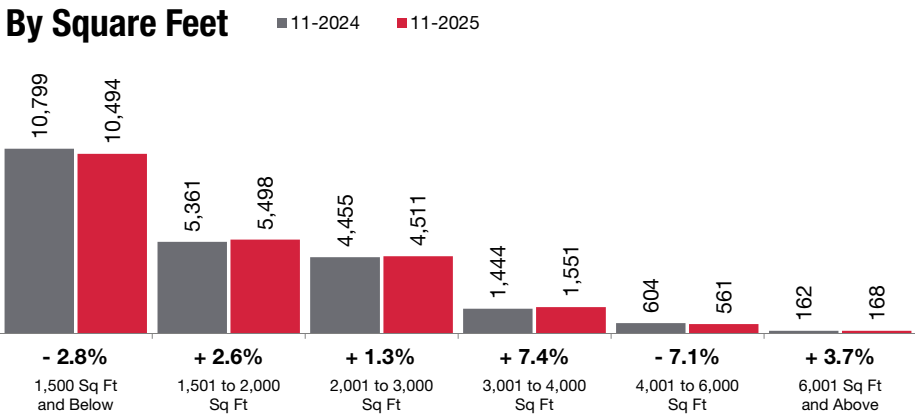
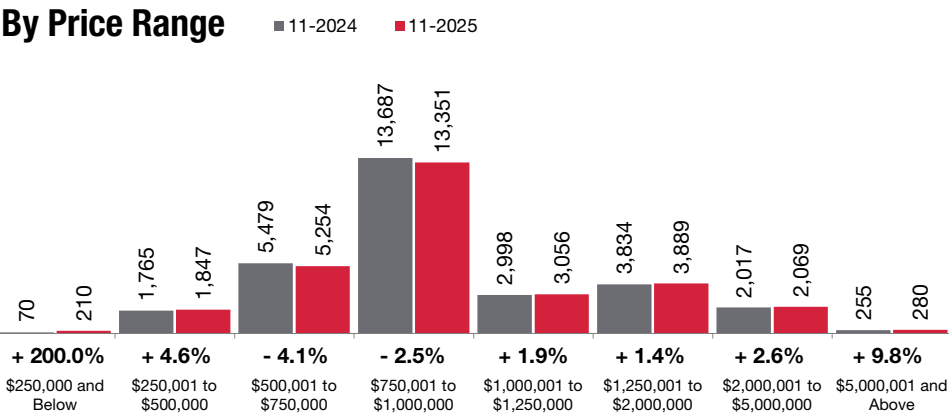
## Condos - Townhomes

By Square Feet	11-2024	11-2025	Change
1,500 Sq Ft and Below	10,950	10,489	- 4.2%
1,501 to 2,000 Sq Ft	5,419	5,559	+ 2.6%
2,001 to 3,000 Sq Ft	4,497	4,554	+ 1.3%
3,001 to 4,000 Sq Ft	1,476	1,557	+ 5.5%
4,001 to 6,000 Sq Ft	603	585	- 3.0%
6,001 Sq Ft and Above	171	175	+ 2.3%
All Square Footage	23,116	22,919	- 0.9%

11-2024	11-2025	Change	11-2024	11-2025	Change
4,599	4,350	- 5.4%	6,351	6,139	- 3.3%
3,924	4,052	+ 3.3%	1,495	1,507	+ 0.8%
4,113	4,169	+ 1.4%	384	385	+ 0.3%
1,431	1,520	+ 6.2%	45	37	- 17.8%
590	576	- 2.4%	13	9	- 30.8%
170	173	+ 1.8%	1	2	+ 100.0%
14,827	14,840	+ 0.1%	8,289	8,079	- 2.5%

# Closed Sales

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



All Properties			
By Price Range	11-2024	11-2025	Change
\$250,000 and Below	70	210	+ 200.0%
\$250,001 to \$500,000	1,765	1,847	+ 4.6%
\$500,001 to \$750,000	5,479	5,254	- 4.1%
\$750,001 to \$1,000,000	13,687	13,351	- 2.5%
\$1,000,001 to \$1,250,000	2,998	3,056	+ 1.9%
\$1,250,001 to \$2,000,000	3,834	3,889	+ 1.4%
\$2,000,001 to \$5,000,000	2,017	2,069	+ 2.6%
\$5,000,001 and Above	255	280	+ 9.8%
All Price Ranges	22,792	22,783	- 0.0%

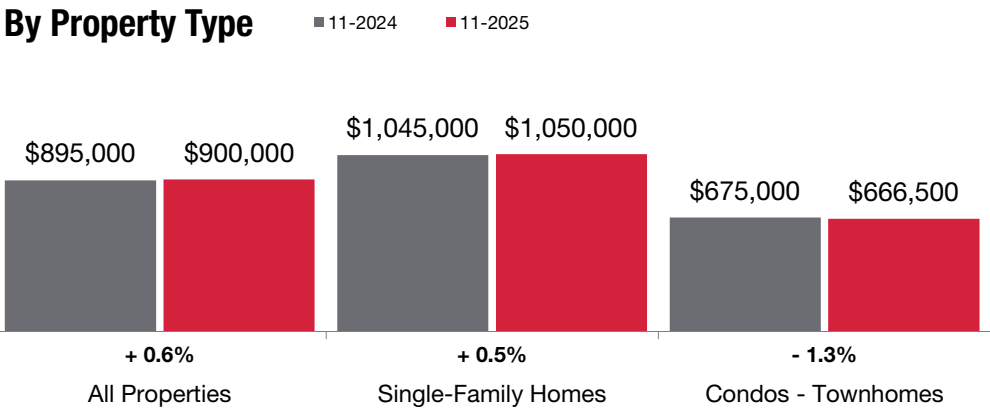
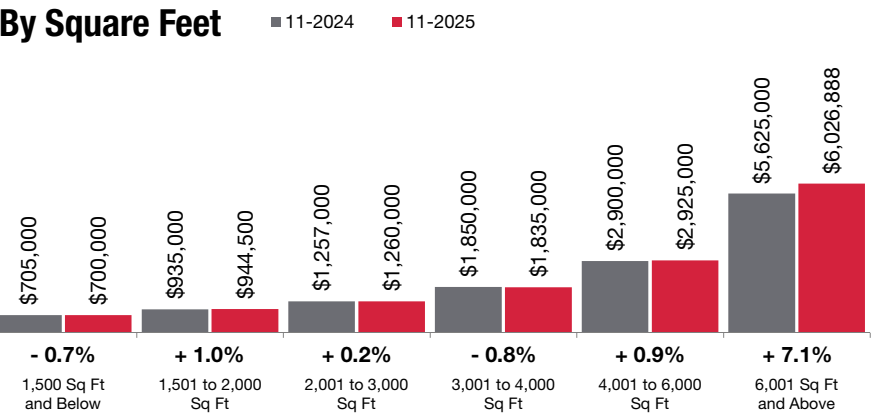
Single-Family Homes			Condos - Townhomes		
11-2024	11-2025	Change	11-2024	11-2025	Change
38	99	+ 160.5%	32	111	+ 246.9%
197	195	- 1.0%	1,568	1,652	+ 5.4%
2,034	1,940	- 4.6%	3,445	3,314	- 3.8%
6,944	6,835	- 1.6%	6,743	6,516	- 3.4%
2,453	2,502	+ 2.0%	545	554	+ 1.7%
3,199	3,278	+ 2.5%	635	611	- 3.8%
1,764	1,787	+ 1.3%	253	282	+ 11.5%
249	262	+ 5.2%	6	18	+ 200.0%
14,610	14,736	+ 0.9%	8,182	8,047	- 1.6%

By Square Feet	11-2024	11-2025	Change
1,500 Sq Ft and Below	10,799	10,494	- 2.8%
1,501 to 2,000 Sq Ft	5,361	5,498	+ 2.6%
2,001 to 3,000 Sq Ft	4,455	4,511	+ 1.3%
3,001 to 4,000 Sq Ft	1,444	1,551	+ 7.4%
4,001 to 6,000 Sq Ft	604	561	- 7.1%
6,001 Sq Ft and Above	162	168	+ 3.7%
All Square Footage	22,792	22,783	- 0.0%

11-2024	11-2025	Change	11-2024	11-2025	Change
4,527	4,355	- 3.8%	6,272	6,139	- 2.1%
3,896	4,013	+ 3.0%	1,465	1,485	+ 1.4%
4,035	4,134	+ 2.5%	387	377	- 2.6%
1,399	1,516	+ 8.4%	45	35	- 22.2%
592	552	- 6.8%	12	9	- 25.0%
161	166	+ 3.1%	1	2	+ 100.0%
14,610	14,736	+ 0.9%	8,182	8,047	- 1.6%

# 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.**

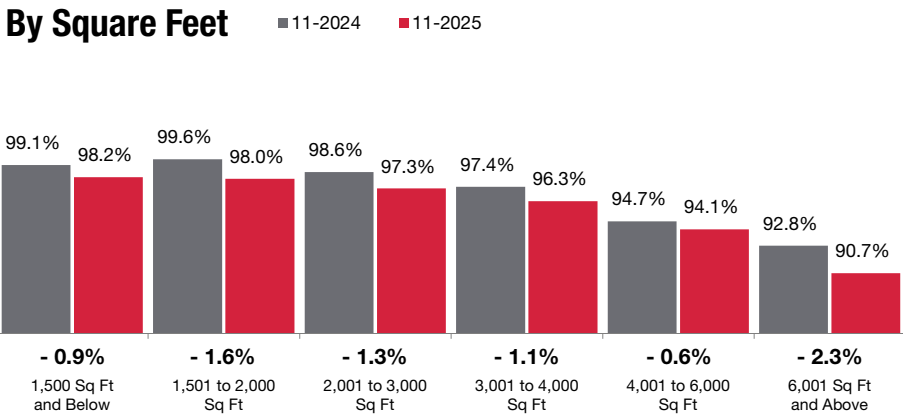
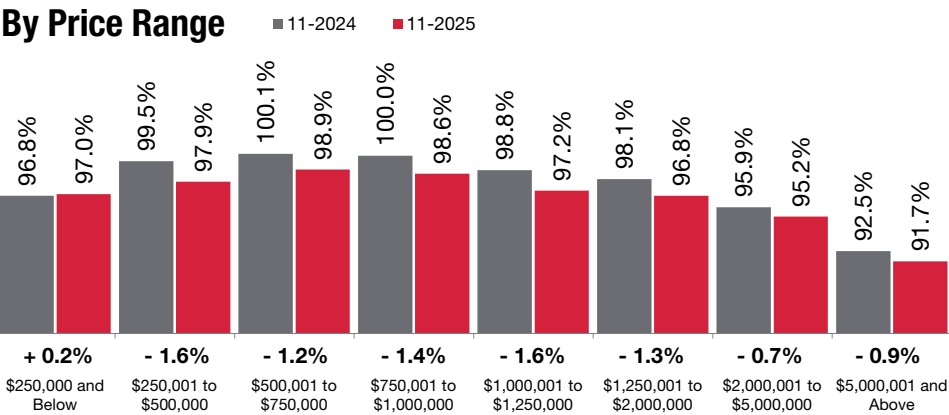


All Properties			
By Square Feet	11-2024	11-2025	Change
1,500 Sq Ft and Below	\$705,000	\$700,000	- 0.7%
1,501 to 2,000 Sq Ft	\$935,000	\$944,500	+ 1.0%
2,001 to 3,000 Sq Ft	\$1,257,000	\$1,260,000	+ 0.2%
3,001 to 4,000 Sq Ft	\$1,850,000	\$1,835,000	- 0.8%
4,001 to 6,000 Sq Ft	\$2,900,000	\$2,925,000	+ 0.9%
6,001 Sq Ft and Above	\$5,625,000	\$6,026,888	+ 7.1%
All Square Footage	\$895,000	\$900,000	+ 0.6%

Single-Family Homes			Condos - Townhomes		
11-2024	11-2025	Change	11-2024	11-2025	Change
\$795,000	\$800,000	+ 0.6%	\$610,000	\$601,000	- 1.5%
\$948,500	\$952,688	+ 0.4%	\$895,000	\$900,000	+ 0.6%
\$1,250,000	\$1,249,000	- 0.1%	\$1,494,995	\$1,530,000	+ 2.3%
\$1,850,000	\$1,817,000	- 1.8%	\$2,325,000	\$2,525,000	+ 8.6%
\$2,900,000	\$2,925,000	+ 0.9%	\$3,930,000	\$3,299,000	- 16.1%
\$5,650,000	\$6,026,888	+ 6.7%	\$2,250,000	\$3,690,550	+ 64.0%
\$1,045,000	\$1,050,000	+ 0.5%	\$675,000	\$666,500	- 1.3%

# 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.**



All Properties			
By Price Range	11-2024	11-2025	Change
\$250,000 and Below	96.8%	97.0%	+ 0.2%
\$250,001 to \$500,000	99.5%	97.9%	- 1.6%
\$500,001 to \$750,000	100.1%	98.9%	- 1.2%
\$750,001 to \$1,000,000	100.0%	98.6%	- 1.4%
\$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	95.9%	95.2%	- 0.7%
\$5,000,001 and Above	92.5%	91.7%	- 0.9%
All Price Ranges	99.1%	97.7%	- 1.4%

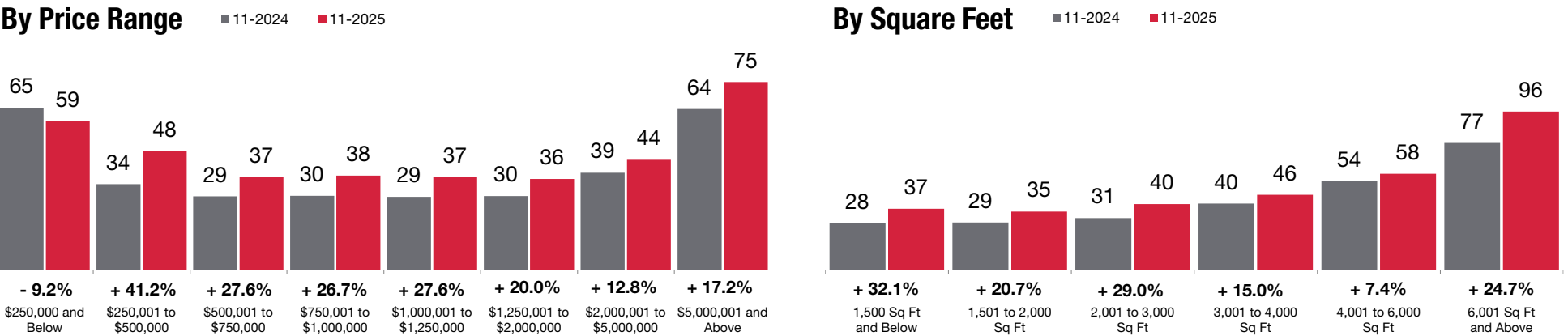
Single-Family Homes			Condos - Townhomes		
11-2024	11-2025	Change	11-2024	11-2025	Change
94.6%	93.8%	- 0.8%	99.8%	99.0%	- 0.8%
101.5%	97.6%	- 3.8%	99.3%	98.0%	- 1.3%
101.1%	100.2%	- 0.9%	99.5%	98.1%	- 1.4%
100.6%	99.2%	- 1.4%	99.3%	97.9%	- 1.4%
99.0%	97.4%	- 1.6%	97.9%	96.4%	- 1.5%
98.4%	96.9%	- 1.5%	96.8%	96.3%	- 0.5%
96.1%	95.3%	- 0.8%	94.4%	94.6%	+ 0.2%
92.6%	91.5%	- 1.2%	88.3%	95.1%	+ 7.7%
99.2%	97.7%	- 1.5%	98.9%	97.5%	- 1.4%

By Square Feet	11-2024	11-2025	Change
1,500 Sq Ft and Below	99.1%	98.2%	- 0.9%
1,501 to 2,000 Sq Ft	99.6%	98.0%	- 1.6%
2,001 to 3,000 Sq Ft	98.6%	97.3%	- 1.3%
3,001 to 4,000 Sq Ft	97.4%	96.3%	- 1.1%
4,001 to 6,000 Sq Ft	94.7%	94.1%	- 0.6%
6,001 Sq Ft and Above	92.8%	90.7%	- 2.3%
All Square Footage	99.1%	97.7%	- 1.4%

11-2024	11-2025	Change	11-2024	11-2025	Change
100.4%	98.8%	- 1.6%	99.1%	97.7%	- 1.4%
99.9%	98.3%	- 1.6%	98.7%	97.3%	- 1.4%
98.7%	97.3%	- 1.4%	97.3%	97.0%	- 0.3%
97.6%	96.3%	- 1.3%	92.5%	94.0%	+ 1.6%
94.8%	94.2%	- 0.6%	91.3%	91.3%	0.0%
92.9%	90.7%	- 2.4%	77.6%	93.4%	+ 20.4%
99.2%	97.7%	- 1.5%	98.9%	97.5%	- 1.4%

# 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.



All Properties				Single-Family Homes			Condos - Townhomes		
By Price Range	11-2024	11-2025	Change	11-2024	11-2025	Change	11-2024	11-2025	Change
\$250,000 and Below	65	59	- 9.2%	69	54	- 21.7%	61	64	+ 4.9%
\$250,001 to \$500,000	34	48	+ 41.2%	40	58	+ 45.0%	34	46	+ 35.3%
\$500,001 to \$750,000	29	37	+ 27.6%	29	35	+ 20.7%	30	39	+ 30.0%
\$750,001 to \$1,000,000	30	38	+ 26.7%	28	35	+ 25.0%	31	41	+ 32.3%
\$1,000,001 to \$1,250,000	29	37	+ 27.6%	29	37	+ 27.6%	32	40	+ 25.0%
\$1,250,001 to \$2,000,000	30	36	+ 20.0%	29	36	+ 24.1%	32	39	+ 21.9%
\$2,000,001 to \$5,000,000	39	44	+ 12.8%	38	43	+ 13.2%	48	51	+ 6.3%
\$5,000,001 and Above	64	75	+ 17.2%	65	77	+ 18.5%	58	55	- 5.2%
All Price Ranges	31	39	+ 25.8%	30	37	+ 23.3%	32	41	+ 28.1%

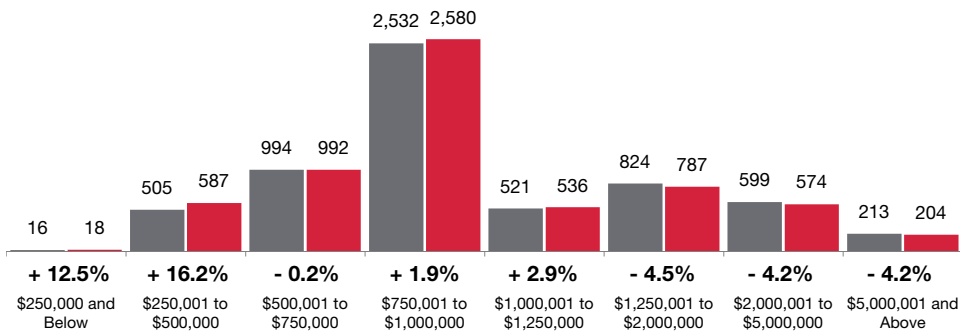
By Square Feet	11-2024	11-2025	Change	11-2024	11-2025	Change	11-2024	11-2025	Change
1,500 Sq Ft and Below	28	37	+ 32.1%	26	32	+ 23.1%	30	41	+ 36.7%
1,501 to 2,000 Sq Ft	29	35	+ 20.7%	27	33	+ 22.2%	35	43	+ 22.9%
2,001 to 3,000 Sq Ft	31	40	+ 29.0%	31	40	+ 29.0%	40	43	+ 7.5%
3,001 to 4,000 Sq Ft	40	46	+ 15.0%	40	45	+ 12.5%	57	53	- 7.0%
4,001 to 6,000 Sq Ft	54	58	+ 7.4%	53	58	+ 9.4%	82	58	- 29.3%
6,001 Sq Ft and Above	77	96	+ 24.7%	76	96	+ 26.3%	142	91	- 35.9%
All Square Footage	31	39	+ 25.8%	30	37	+ 23.3%	32	41	+ 28.1%

# 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.

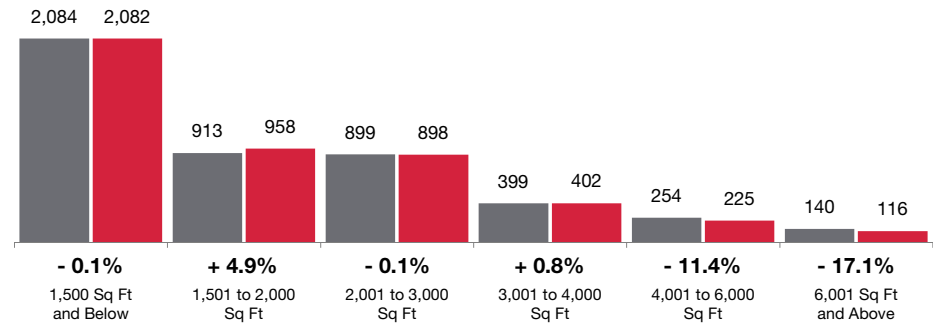
## By Price Range

■ 11-2024 ■ 11-2025



## By Square Feet

■ 11-2024 ■ 11-2025



## All Properties

By Price Range	11-2024	11-2025	Change
\$250,000 and Below	16	18	+ 12.5%
\$250,001 to \$500,000	505	587	+ 16.2%
\$500,001 to \$750,000	994	992	- 0.2%
\$750,001 to \$1,000,000	2,532	2,580	+ 1.9%
\$1,000,001 to \$1,250,000	521	536	+ 2.9%
\$1,250,001 to \$2,000,000	824	787	- 4.5%
\$2,000,001 to \$5,000,000	599	574	- 4.2%
\$5,000,001 and Above	213	204	- 4.2%
All Price Ranges	4,689	4,683	- 0.1%

## Single-Family Homes

11-2024	11-2025	Change
6	4	- 33.3%
65	68	+ 4.6%
315	245	- 22.2%
1,081	959	- 11.3%
406	410	+ 1.0%
652	627	- 3.8%
491	477	- 2.9%
208	193	- 7.2%
2,838	2,667	- 6.0%

## Condos - Townhomes

11-2024	11-2025	Change
10	14	+ 40.0%
440	519	+ 18.0%
679	747	+ 10.0%
1,451	1,621	+ 11.7%
115	126	+ 9.6%
172	160	- 7.0%
108	97	- 10.2%
5	11	+ 120.0%
1,851	2,016	+ 8.9%

## By Square Feet

11-2024	11-2025	Change
2,084	2,082	- 0.1%
913	958	+ 4.9%
899	898	- 0.1%
399	402	+ 0.8%
254	225	- 11.4%
140	116	- 17.1%
4,689	4,683	- 0.1%

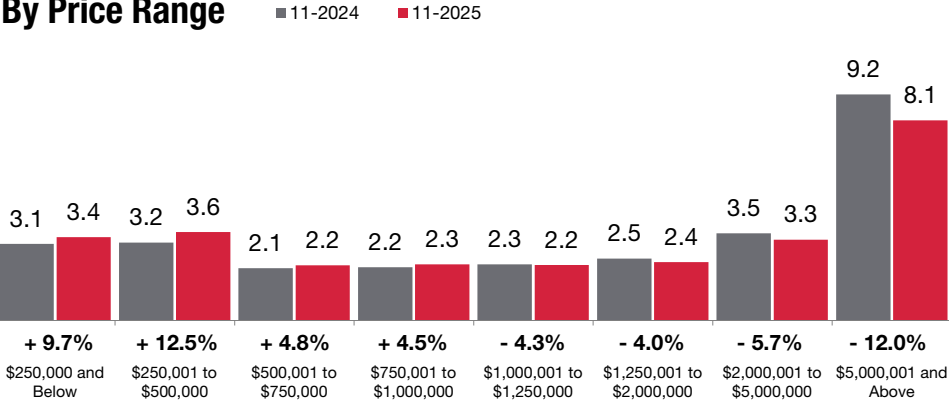
11-2024	11-2025	Change
688	583	- 15.3%
585	576	- 1.5%
793	789	- 0.5%
386	386	0.0%
247	216	- 12.6%
139	115	- 17.3%
2,838	2,667	- 6.0%

11-2024	11-2025	Change
1,396	1,499	+ 7.4%
328	382	+ 16.5%
106	109	+ 2.8%
13	16	+ 23.1%
7	9	+ 28.6%
1	1	0.0%
1,851	2,016	+ 8.9%

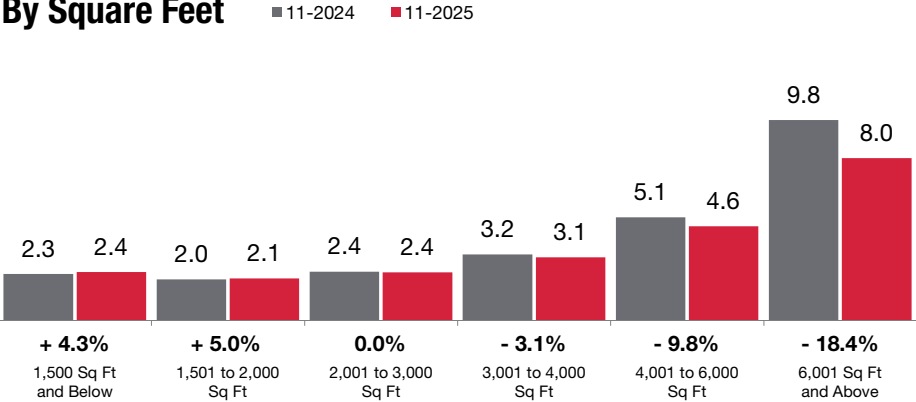
# Months Supply of Inventory

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



## By Square Feet



### All Properties

By Price Range	11-2024	11-2025	Change
\$250,000 and Below	3.1	3.4	+ 9.7%
\$250,001 to \$500,000	3.2	3.6	+ 12.5%
\$500,001 to \$750,000	2.1	2.2	+ 4.8%
\$750,001 to \$1,000,000	2.2	2.3	+ 4.5%
\$1,000,001 to \$1,250,000	2.3	2.2	- 4.3%
\$1,250,001 to \$2,000,000	2.5	2.4	- 4.0%
\$2,000,001 to \$5,000,000	3.5	3.3	- 5.7%
\$5,000,001 and Above	9.2	8.1	- 12.0%
All Price Ranges	2.4	2.5	+ 4.2%

### Single-Family Homes

11-2024	11-2025	Change	11-2024	11-2025	Change
2.1	1.7	- 19.0%	3.9	4.1	+ 5.1%
3.7	4.1	+ 10.8%	3.1	3.5	+ 12.9%
1.7	1.4	- 17.6%	2.4	2.7	+ 12.5%
1.8	1.6	- 11.1%	2.5	2.9	+ 16.0%
2.2	2.1	- 4.5%	2.7	2.8	+ 3.7%
2.4	2.2	- 8.3%	3.1	3.0	- 3.2%
3.3	3.2	- 3.0%	4.8	4.0	- 16.7%
9.2	8.0	- 13.0%	3.1	7.6	+ 145.2%
2.3	2.2	- 4.3%	2.7	3.0	+ 11.1%

### Condos - Townhomes

By Square Feet	11-2024	11-2025	Change
1,500 Sq Ft and Below	2.3	2.4	+ 4.3%
1,501 to 2,000 Sq Ft	2.0	2.1	+ 5.0%
2,001 to 3,000 Sq Ft	2.4	2.4	0.0%
3,001 to 4,000 Sq Ft	3.2	3.1	- 3.1%
4,001 to 6,000 Sq Ft	5.1	4.6	- 9.8%
6,001 Sq Ft and Above	9.8	8.0	- 18.4%
All Square Footage	2.4	2.5	+ 4.2%

11-2024	11-2025	Change	11-2024	11-2025	Change
1.8	1.6	- 11.1%	2.6	2.9	+ 11.5%
1.8	1.7	- 5.6%	2.6	3.0	+ 15.4%
2.3	2.3	0.0%	3.3	3.4	+ 3.0%
3.2	3.0	- 6.3%	3.5	3.9	+ 11.4%
5.0	4.5	- 10.0%	4.3	8.0	+ 86.0%
9.8	8.0	- 18.4%	1.0	1.0	0.0%
2.3	2.2	- 4.3%	2.7	3.0	+ 11.1%