

Quarterly Indicators

Provided by OneKey® MLS

Orange County



Q3-2025

The U.S. housing market showed modest improvement in the third quarter of 2025, despite ongoing affordability challenges and a limited supply of existing homes for sale. Mortgage rates began the summer in the mid-to-high 6% range and gradually declined, helping to boost existing-home sales in July before activity leveled off in August. Some economists believe a combination of lower rates and increased inventory could support additional sales gains in the months ahead.

- Single-Family Closed Sales were up 2.2 percent to 737.
- Condos Closed Sales were up 2.7 percent to 115.
- Co-ops Closed Sales remained flat at 3.
- Single-Family Median Sales Price increased 2.1 percent to \$485,000.
- Condos Median Sales Price increased 2.1 percent to \$320,000.
- Co-ops Median Sales Price decreased 0.3 percent to \$159,500.

Nationally, active listings grew by double digits year-over-year in the third quarter, with the number of homes on the market reaching its highest level since May 2020, according to the National Association of REALTORS®. Although home prices remain elevated in many areas, the pace of growth has slowed, and homes are taking longer to sell than they did a year ago. Buyers entering the market this fall may benefit from increased inventory, greater negotiating power, and a less competitive landscape.

Quarterly Snapshot

+ 2.3% **+ 10.9%** **+ 2.7%**

One-Year Change in Closed Sales All Properties	One-Year Change in Homes for Sale All Properties	One-Year Change in Median Sales Price All Properties
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Residential real estate activity in Orange County, comprised of single family properties, condominiums, and co-ops. Percent changes are calculated using rounded figures.

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Single Family Homes Market Overview

Key metrics for **Single-Family Homes Only** for the report quarter and for year-to-date (YTD) starting from the first of the year.

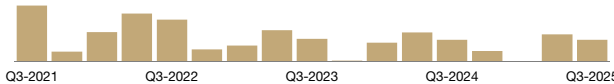
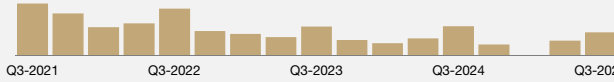
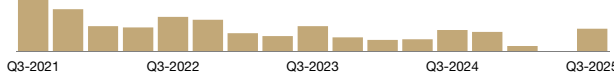
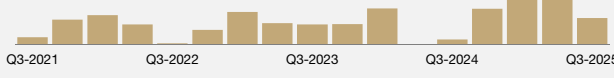
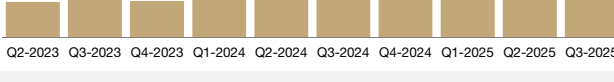
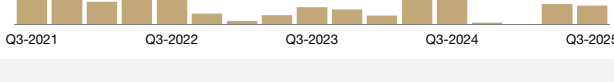
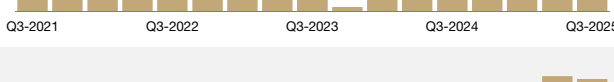
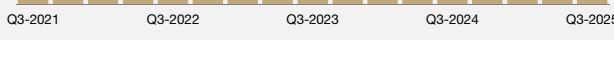


Key Metrics	Historical Sparkbars	Q3-2024	Q3-2025	Percent Change	YTD 2024	YTD 2025	Percent Change
New Listings		1,055	1,046	- 0.9%	2,817	2,966	+ 5.3%
Pending Sales		745	728	- 2.3%	1,938	1,923	- 0.8%
Closed Sales		721	737	+ 2.2%	1,799	1,833	+ 1.9%
Days on Market		46	50	+ 8.7%	57	61	+ 7.0%
Median Pending Price		\$490,000	\$478,000	- 2.4%	\$475,000	\$475,500	+ 0.1%
Median Sales Price		\$475,000	\$485,000	+ 2.1%	\$460,000	\$475,000	+ 3.3%
Pct. of Orig. Price Received		99.3%	99.0%	- 0.3%	98.5%	98.3%	- 0.2%
Housing Affordability Index		89	86	- 3.4%	92	88	- 4.3%
Inventory of Homes for Sale		881	965	+ 9.5%	--	--	--
Months Supply of Inventory		4.2	4.6	+ 9.5%	--	--	--

Condos Market Overview

Key metrics for **Condominiums Only** for the report quarter and for year-to-date (YTD) starting from the first of the year.



Key Metrics	Historical Sparkbars	Q3-2024	Q3-2025	Percent Change	YTD 2024	YTD 2025	Percent Change
New Listings		125	125	0.0%	383	346	- 9.7%
Pending Sales		119	108	- 9.2%	304	268	- 11.8%
Closed Sales		112	115	+ 2.7%	292	254	- 13.0%
Days on Market		31	40	+ 29.0%	34	47	+ 38.2%
Median Pending Price		\$315,000	\$310,000	- 1.6%	\$310,000	\$318,000	+ 2.6%
Median Sales Price		\$313,500	\$320,000	+ 2.1%	\$308,000	\$319,000	+ 3.6%
Pct. of Orig. Price Received		101.3%	100.1%	- 1.2%	100.6%	99.6%	- 1.0%
Housing Affordability Index		134	130	- 3.0%	137	131	- 4.4%
Inventory of Homes for Sale		69	88	+ 27.5%	--	--	--
Months Supply of Inventory		2.1	3.0	+ 42.9%	--	--	--

Co-ops Market Overview

Key metrics for **Co-operatives Only** for the report quarter and for year-to-date (YTD) starting from the first of the year.

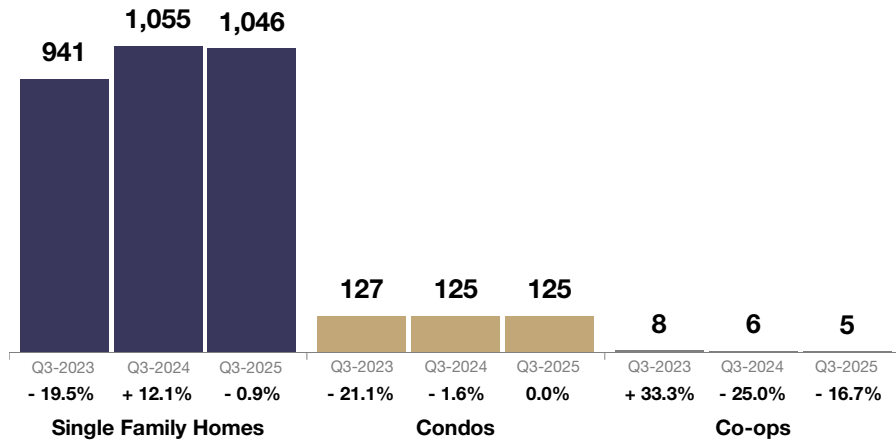


Key Metrics	Historical Sparkbars	Q3-2024	Q3-2025	Percent Change	YTD 2024	YTD 2025	Percent Change
New Listings		6	5	- 16.7%	20	19	- 5.0%
Pending Sales		4	3	- 25.0%	18	17	- 5.6%
Closed Sales		3	3	0.0%	14	16	+ 14.3%
Days on Market		38	85	+ 123.7%	68	65	- 4.4%
Median Pending Price		\$145,000	\$152,000	+ 4.8%	\$150,000	\$158,750	+ 5.8%
Median Sales Price		\$159,900	\$159,500	- 0.3%	\$145,250	\$159,750	+ 10.0%
Pct. of Orig. Price Received		100.4%	95.1%	- 5.3%	98.4%	95.7%	- 2.7%
Housing Affordability Index		264	261	- 1.1%	290	261	- 10.0%
Inventory of Homes for Sale		5	6	+ 20.0%	--	--	--
Months Supply of Inventory		2.3	2.4	+ 4.3%	--	--	--

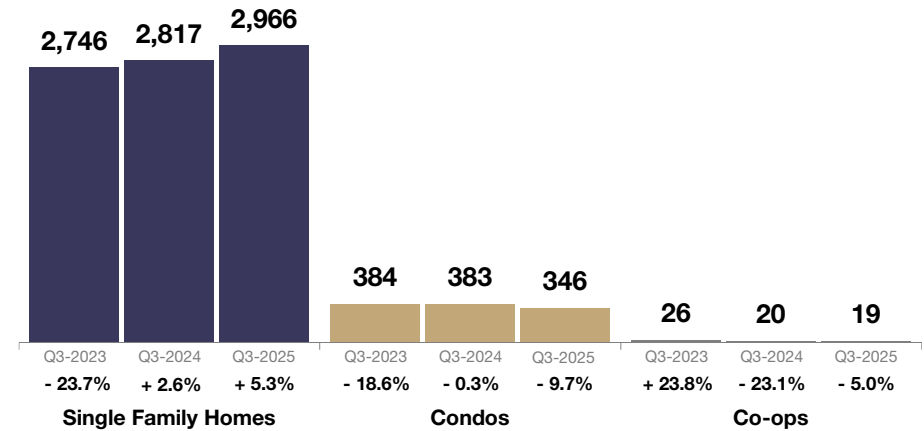
New Listings

A count of the properties that have been newly listed on the market in a given quarter.

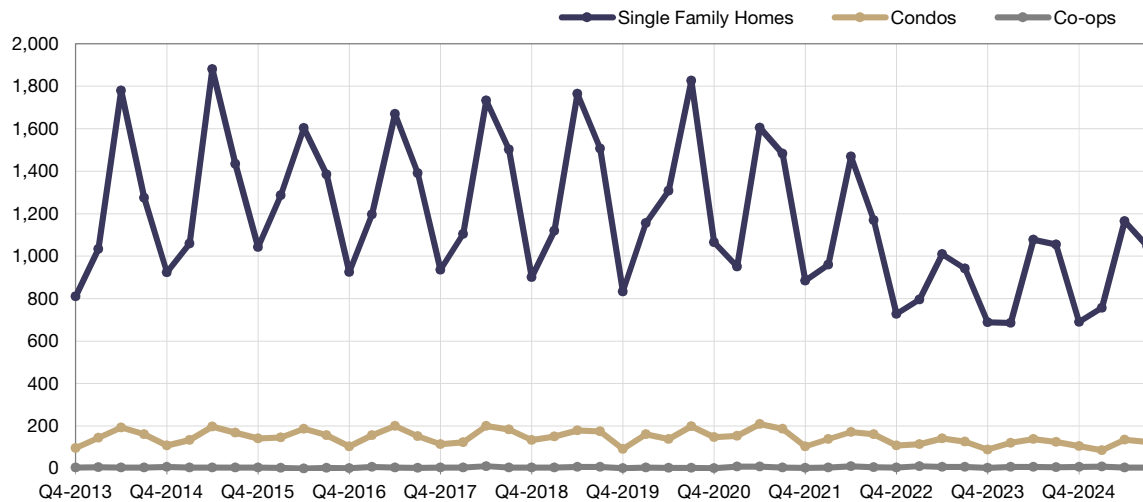
Q3-2025



Year to Date



Historical New Listings by Quarter



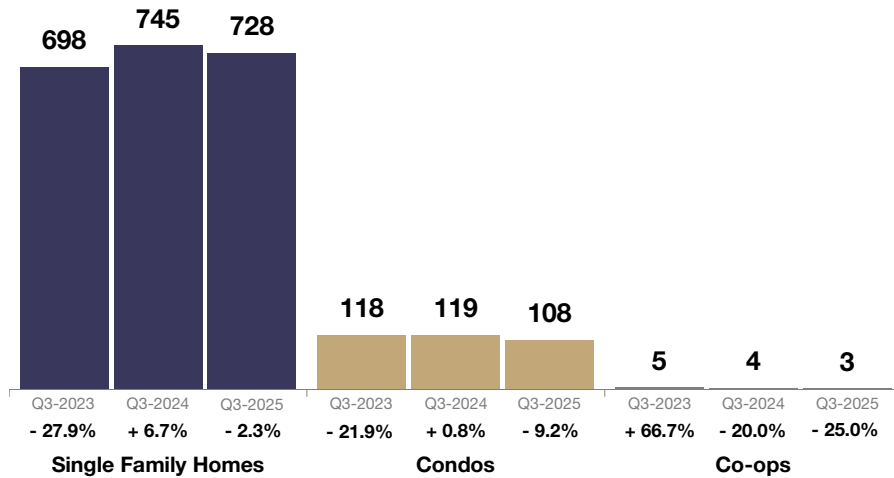
Note: If no activity occurred during a quarter, no data point is shown and the line extends to the next available data point.

Quarter	Single Family Homes	Condos	Co-ops
Q4-2022	728	108	5
Q1-2023	796	115	11
Q2-2023	1,009	142	7
Q3-2023	941	127	8
Q4-2023	689	88	3
Q1-2024	685	120	7
Q2-2024	1,077	138	7
Q3-2024	1,055	125	6
Q4-2024	690	105	7
Q1-2025	756	86	9
Q2-2025	1,164	135	5
Q3-2025	1,046	125	5

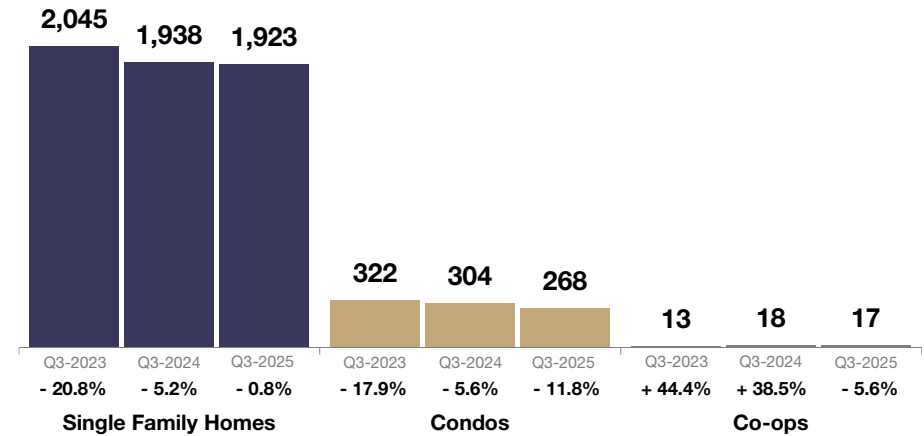
Pending Sales

A count of the properties on which offers have been accepted in a given quarter.

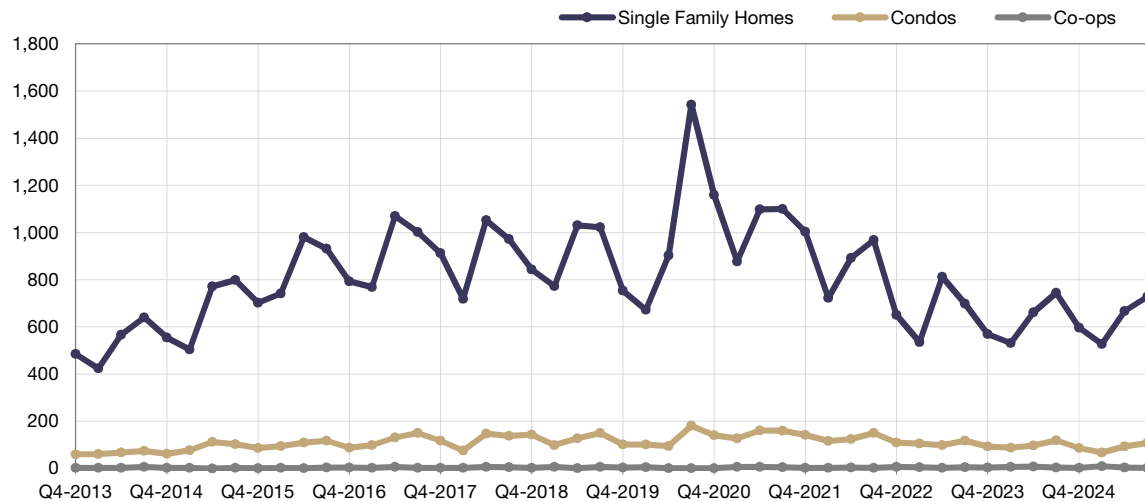
Q3-2025



Year to Date



Historical Pending Sales by Quarter



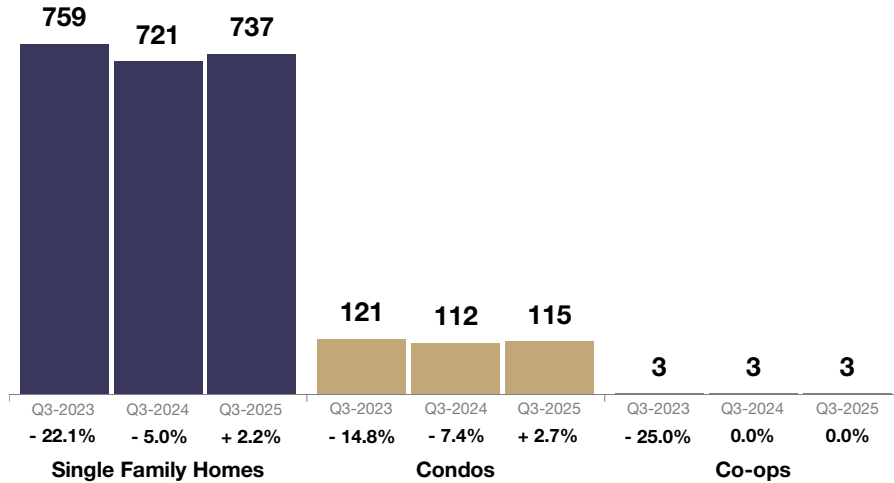
Note: If no activity occurred during a quarter, no data point is shown and the line extends to the next available data point.

Quarter	Single Family Homes	Condos	Co-ops
Q4-2022	651	110	7
Q1-2023	535	105	5
Q2-2023	812	99	3
Q3-2023	698	118	5
Q4-2023	570	94	4
Q1-2024	531	88	6
Q2-2024	662	97	8
Q3-2024	745	119	4
Q4-2024	596	86	3
Q1-2025	528	67	10
Q2-2025	667	93	4
Q3-2025	728	108	3

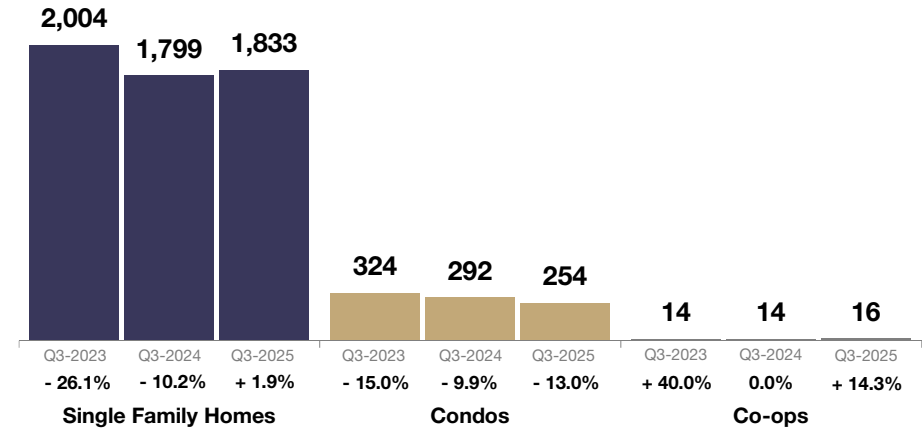
Closed Sales

A count of the actual sales that closed in a given quarter.

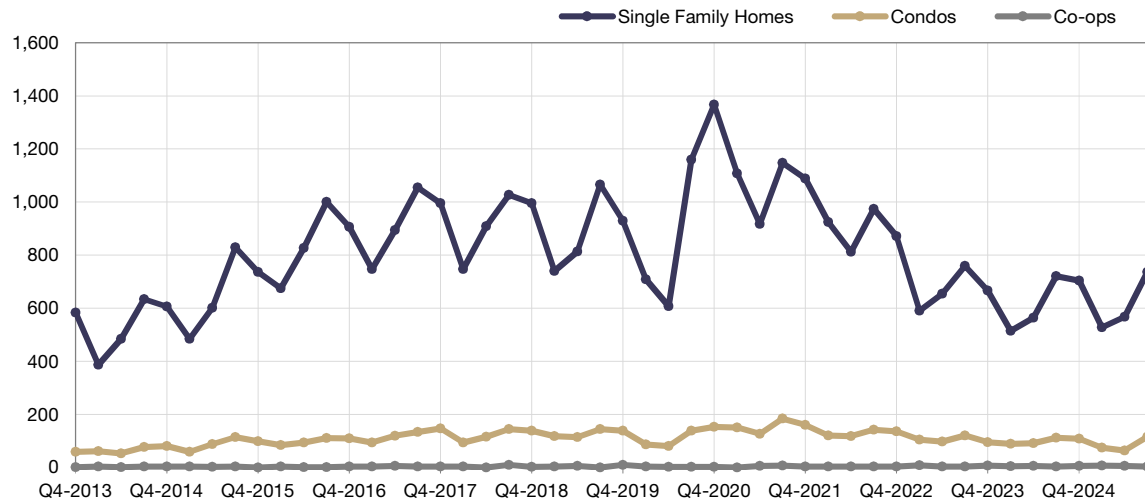
Q3-2025



Year to Date



Historical Closed Sales by Quarter



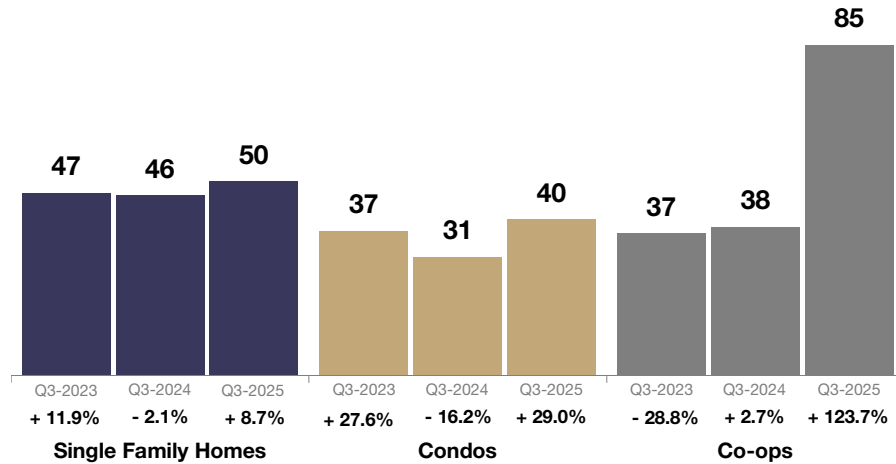
Note: If no activity occurred during a quarter, no data point is shown and the line extends to the next available data point.

Quarter	Single Family Homes	Condos	Co-ops
Q4-2022	871	136	4
Q1-2023	591	105	8
Q2-2023	654	98	3
Q3-2023	759	121	3
Q4-2023	666	95	7
Q1-2024	514	89	5
Q2-2024	564	91	6
Q3-2024	721	112	3
Q4-2024	704	108	6
Q1-2025	528	75	7
Q2-2025	568	64	6
Q3-2025	737	115	3

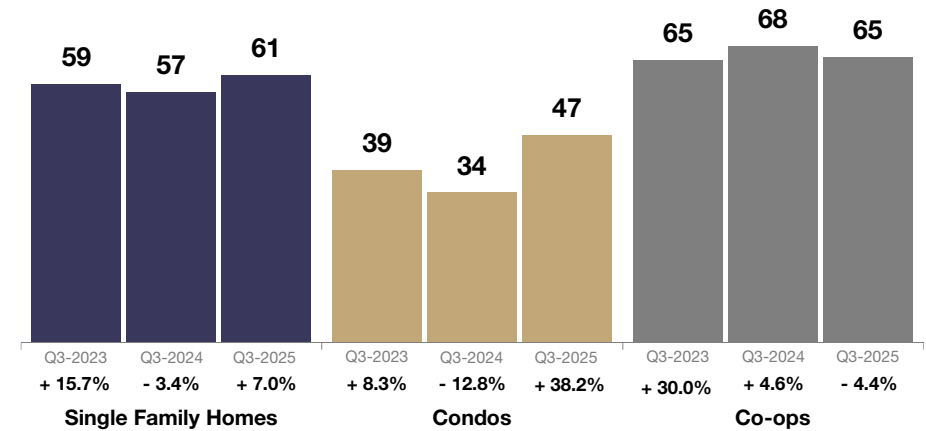
Days on Market Until Sale

Average number of days between when a property is listed and when an offer is accepted in a given quarter.

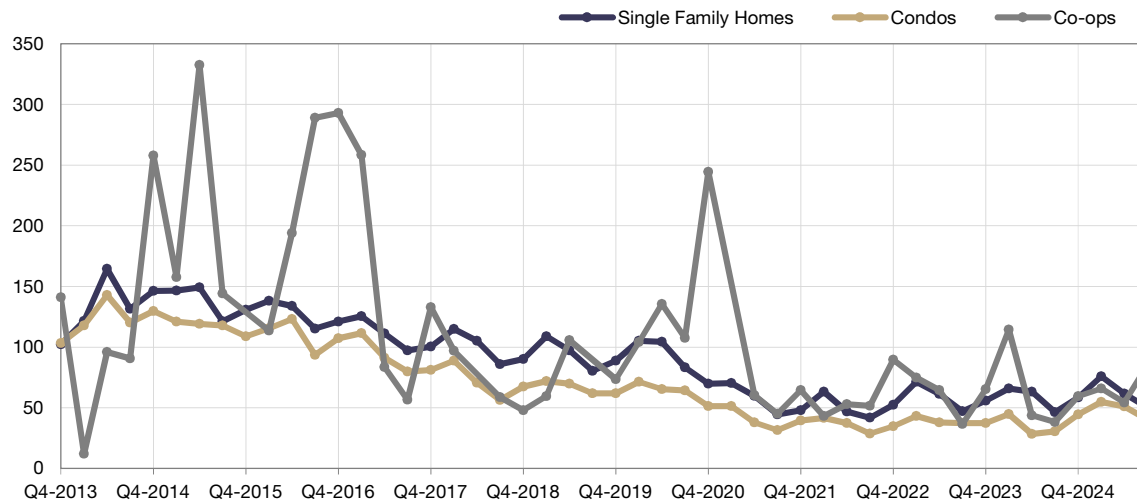
Q3-2025



Year to Date



Historical Days on Market Until Sale by Quarter



Note: If no activity occurred during a quarter, no data point is shown and the line extends to the next available data point.

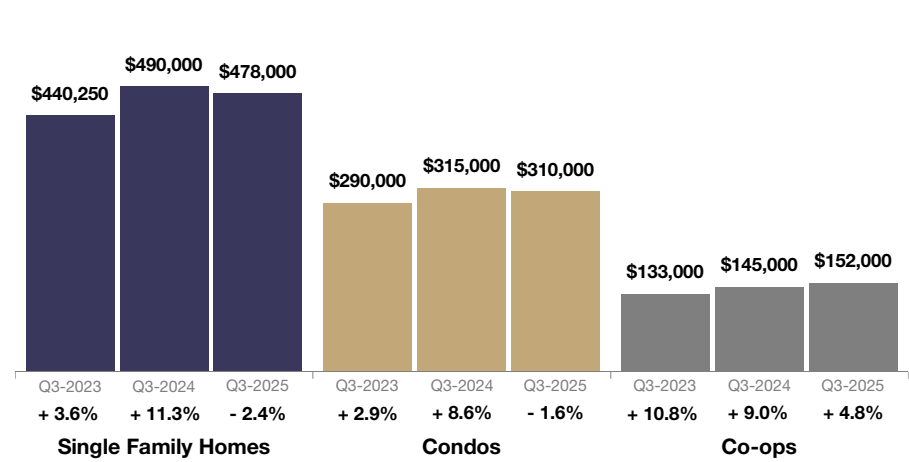
Quarter	Single Family Homes	Condos	Co-ops
Q4-2022	52	35	90
Q1-2023	72	43	75
Q2-2023	61	38	65
Q3-2023	47	37	37
Q4-2023	56	37	65
Q1-2024	66	45	114
Q2-2024	63	28	44
Q3-2024	46	31	38
Q4-2024	58	44	60
Q1-2025	76	55	66
Q2-2025	62	51	54
Q3-2025	50	40	85

Median Pending Price

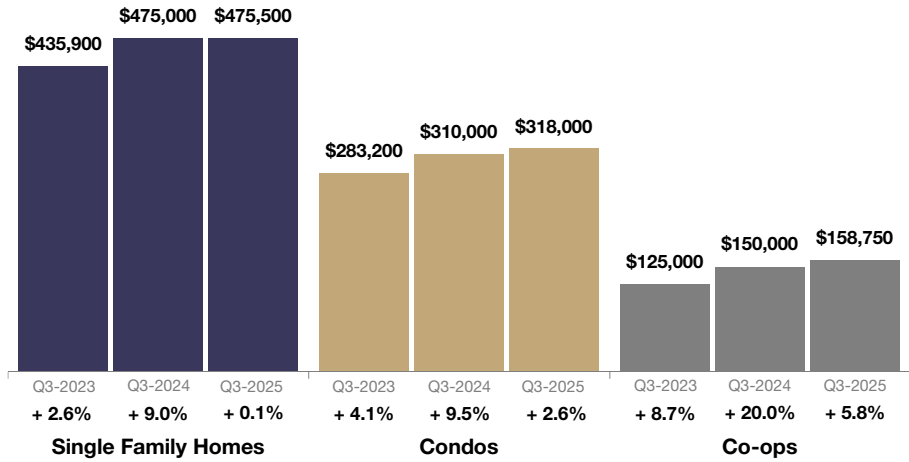
Point at which half of the pending sales sold for more and half sold for less, not accounting for seller concessions, in a given quarter.



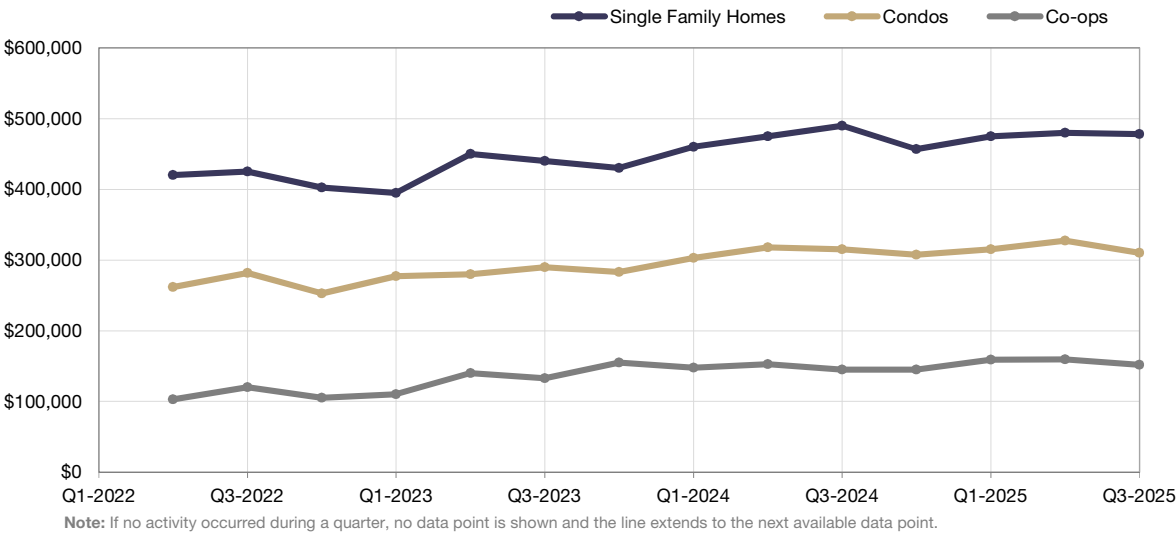
Q3-2025



Year to Date



Historical Median Pending Price by Quarter

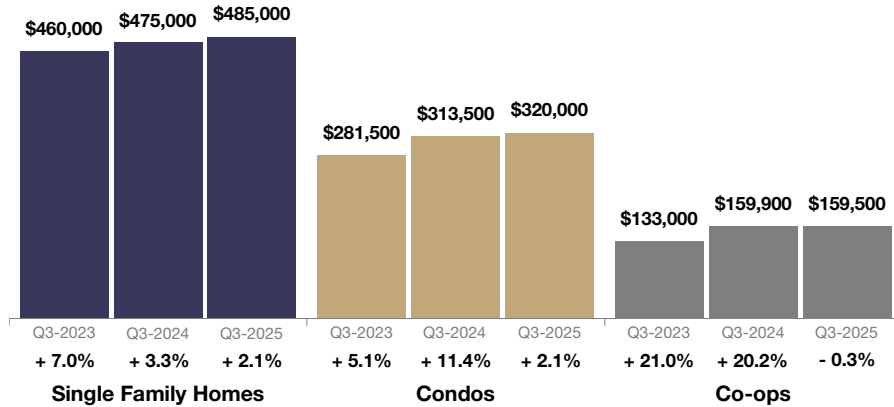


Quarter	Single Family Homes	Condos	Co-ops
--	--	--	--
Q1-2023	\$395,000	\$277,000	\$110,000
Q2-2023	\$450,000	\$280,000	\$140,000
Q3-2023	\$440,250	\$290,000	\$133,000
Q4-2023	\$430,000	\$283,250	\$155,000
Q1-2024	\$459,900	\$303,000	\$147,750
Q2-2024	\$475,000	\$318,000	\$152,500
Q3-2024	\$490,000	\$315,000	\$145,000
Q4-2024	\$457,000	\$307,500	\$145,000
Q1-2025	\$475,000	\$315,000	\$159,000
Q2-2025	\$480,000	\$327,500	\$159,500
Q3-2025	\$478,000	\$310,000	\$152,000

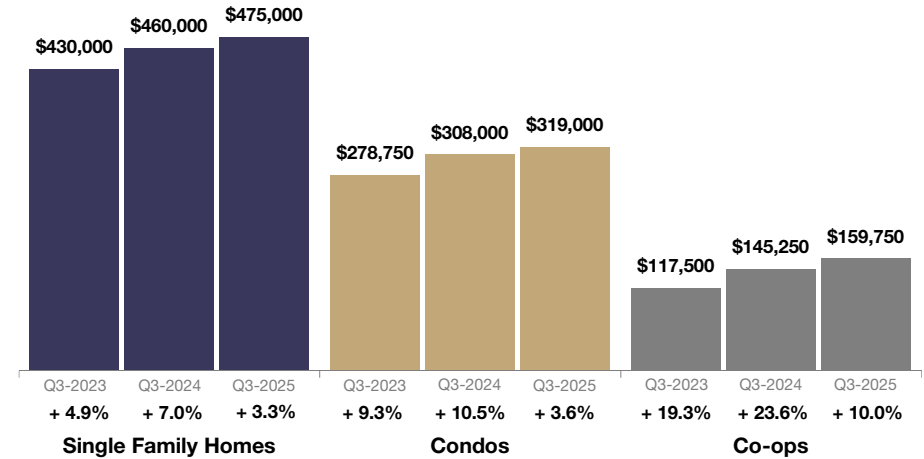
Median Sales Price

Point at which half of the sales sold for more and half sold for less, not accounting for seller concessions, in a given quarter.

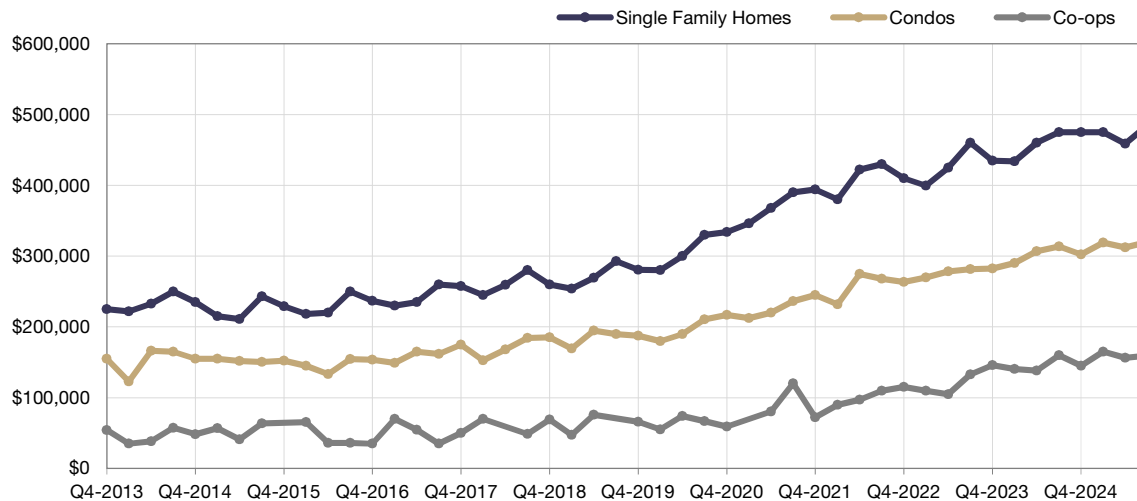
Q3-2025



Year to Date



Historical Median Sales Price by Quarter



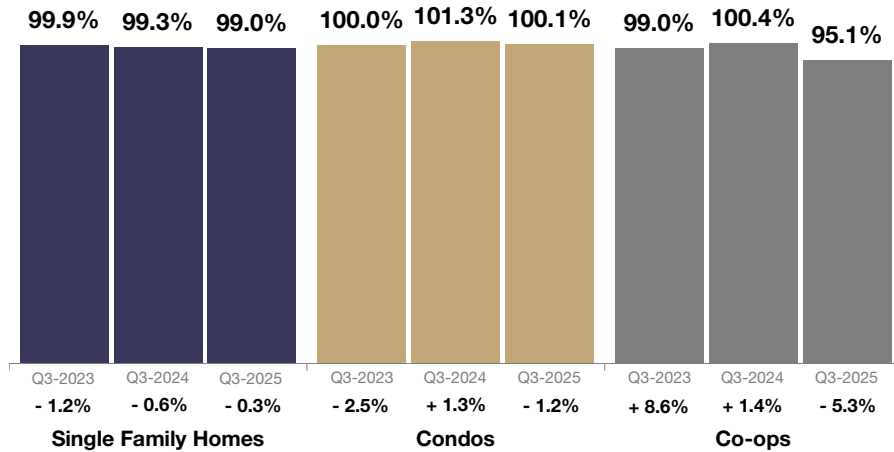
Quarter	Single Family Homes	Condos	Co-ops
Q4-2022	\$410,000	\$263,500	\$115,000
Q1-2023	\$399,500	\$270,000	\$110,000
Q2-2023	\$425,000	\$278,500	\$105,000
Q3-2023	\$460,000	\$281,500	\$133,000
Q4-2023	\$435,000	\$282,500	\$146,000
Q1-2024	\$433,900	\$290,000	\$140,500
Q2-2024	\$460,000	\$307,000	\$138,500
Q3-2024	\$475,000	\$313,500	\$159,900
Q4-2024	\$475,000	\$302,500	\$145,000
Q1-2025	\$475,000	\$319,000	\$165,000
Q2-2025	\$458,950	\$312,500	\$156,500
Q3-2025	\$485,000	\$320,000	\$159,500

Note: If no activity occurred during a quarter, no data point is shown and the line extends to the next available data point.

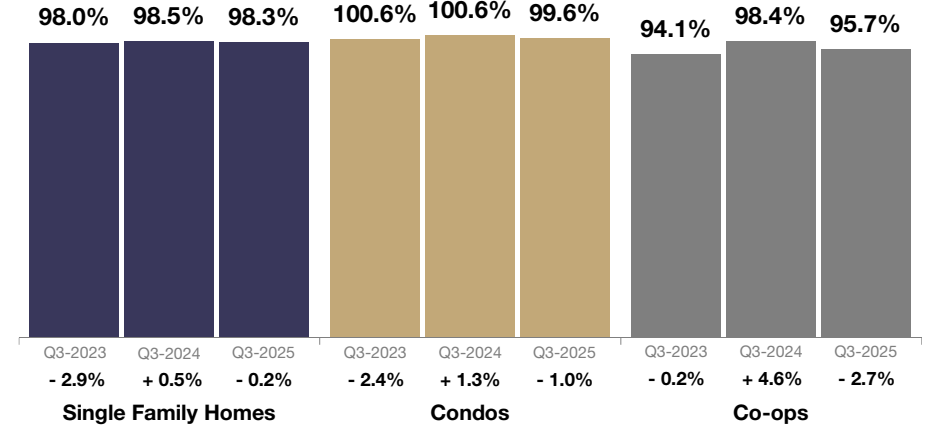
Percent of Original List Price Received

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.

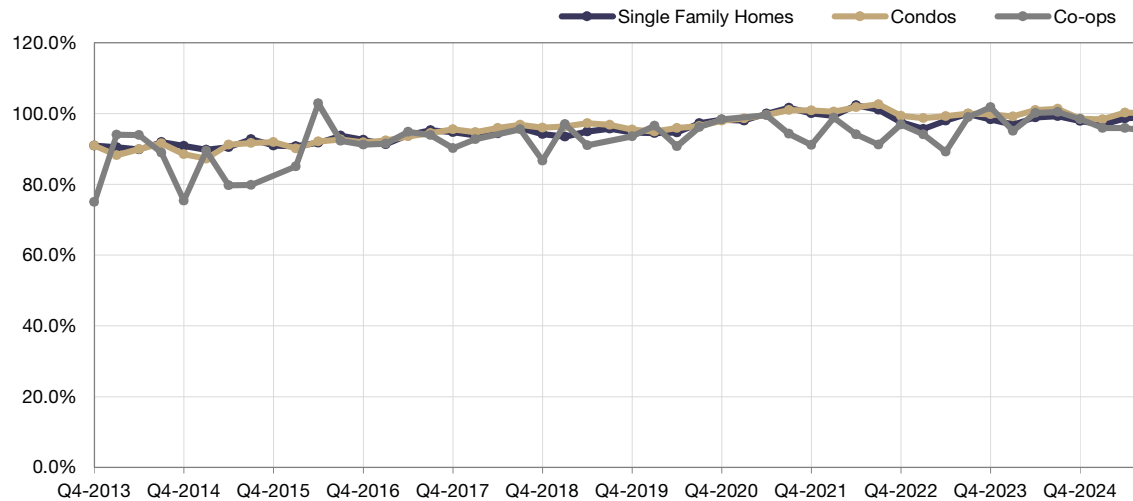
Q3-2025



Year to Date



Historical Percent of Original List Price Received by Quarter



Note: If no activity occurred during a quarter, no data point is shown and the line extends to the next available data point.

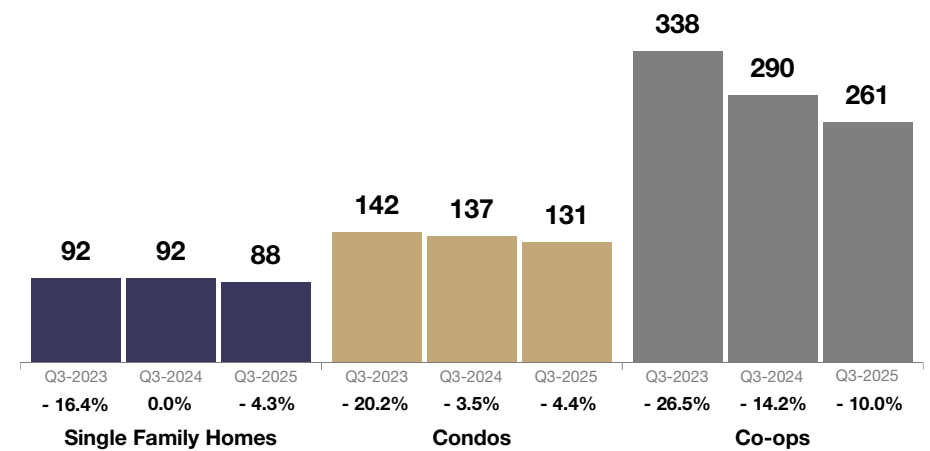
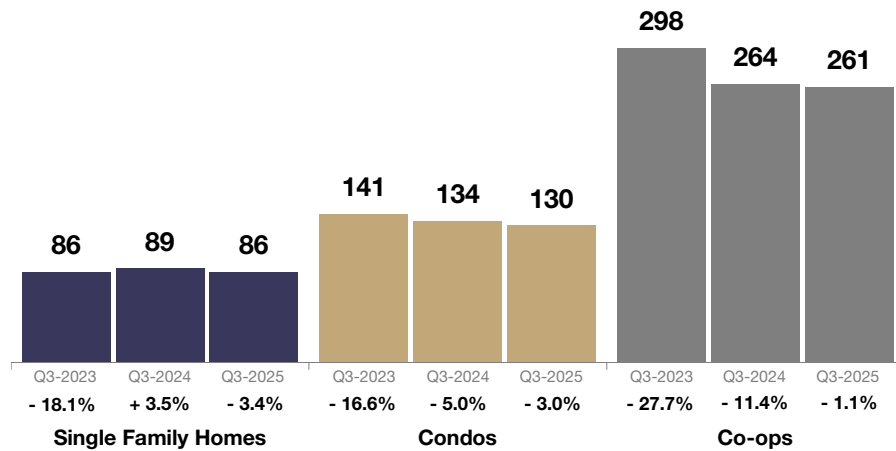
Quarter	Single Family Homes	Condos	Co-ops
Q4-2022	97.6%	99.4%	96.9%
Q1-2023	95.6%	98.7%	94.2%
Q2-2023	98.0%	99.2%	89.3%
Q3-2023	99.9%	100.0%	99.0%
Q4-2023	98.3%	99.8%	101.8%
Q1-2024	96.9%	99.2%	95.1%
Q2-2024	98.9%	101.0%	100.2%
Q3-2024	99.3%	101.3%	100.4%
Q4-2024	97.9%	98.6%	98.5%
Q1-2025	96.9%	98.4%	95.9%
Q2-2025	98.6%	100.3%	95.9%
Q3-2025	99.0%	100.1%	95.1%

Housing Affordability Index

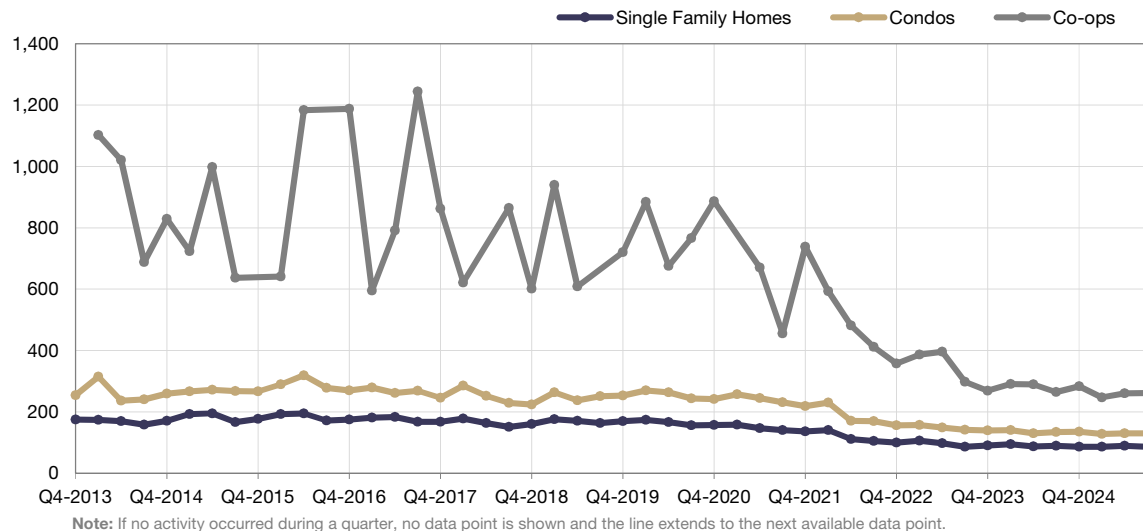
This index measures housing affordability for the region. For example, an index of 120 means the median household income is 120% of what is necessary to qualify for the median-priced home under prevailing interest rates. A higher number means greater affordability.

Q3-2025

Year to Date



Historical Housing Affordability Index by Quarter

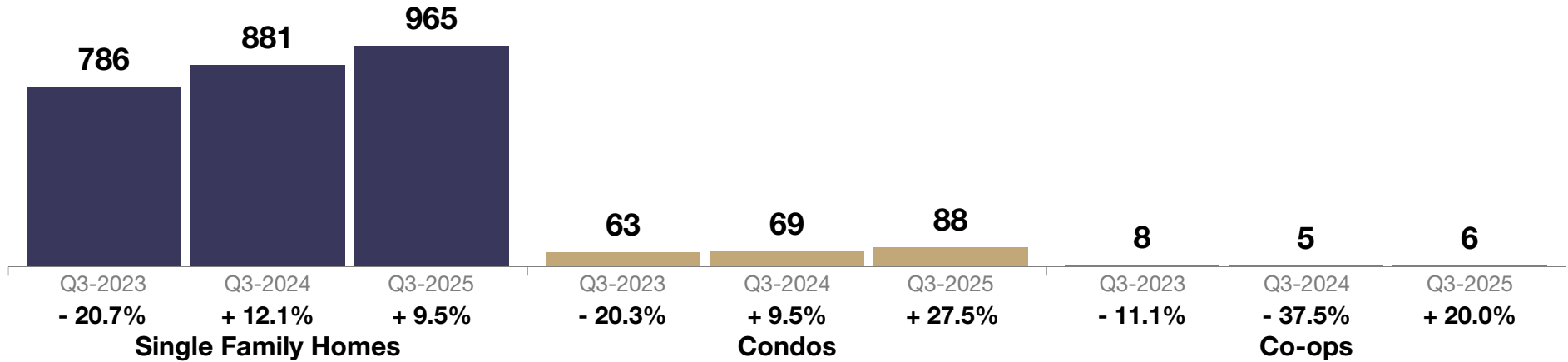


Quarter	Single Family Homes	Condos	Co-ops
Q4-2022	100	156	357
Q1-2023	106	157	386
Q2-2023	98	149	396
Q3-2023	86	141	298
Q4-2023	90	139	269
Q1-2024	94	140	290
Q2-2024	87	130	289
Q3-2024	89	134	264
Q4-2024	86	135	283
Q1-2025	86	128	247
Q2-2025	89	130	260
Q3-2025	86	130	261

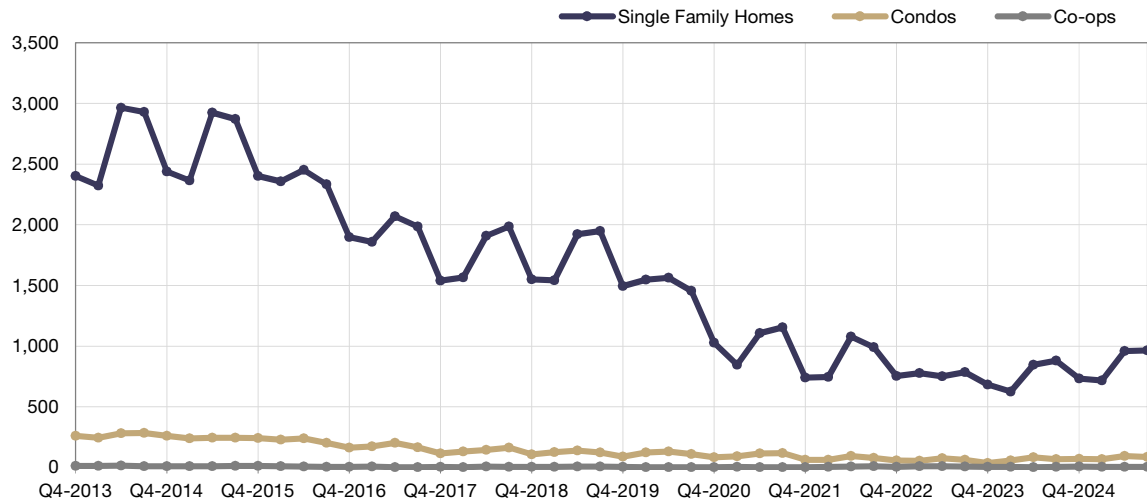
Inventory of Homes for Sale

The number of properties available for sale in active status at the end of a given quarter.

Q3-2025



Historical Inventory of Homes for Sale by Quarter



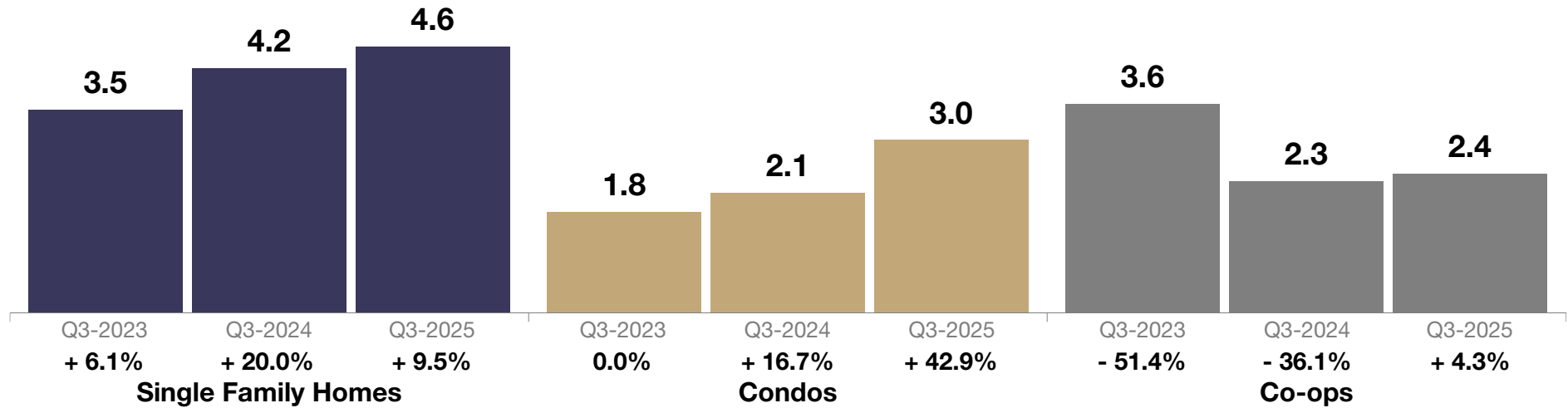
Note: If no activity occurred during a quarter, no data point is shown and the line extends to the next available data point.

Quarter	Single Family Homes	Condos	Co-ops
Q4-2022	754	57	6
Q1-2023	778	54	9
Q2-2023	752	77	10
Q3-2023	786	63	8
Q4-2023	682	37	5
Q1-2024	625	59	5
Q2-2024	845	83	3
Q3-2024	881	69	5
Q4-2024	732	70	7
Q1-2025	716	67	6
Q2-2025	959	95	5
Q3-2025	965	88	6

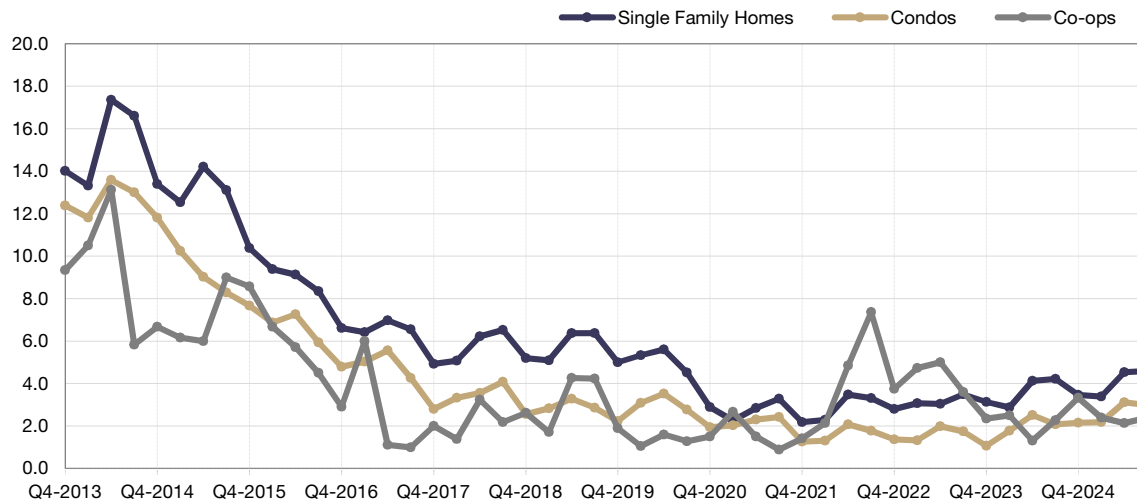
Months Supply of Inventory

The inventory of homes for sale at the end of a given quarter, divided by the average monthly pending sales from the last 4 quarters.

Q3-2025



Historical Months Supply of Inventory by Quarter



Note: If no activity occurred during a quarter, no data point is shown and the line extends to the next available data point.

Quarter	Single Family Homes	Condos	Co-ops
Q4-2022	2.8	1.4	3.8
Q1-2023	3.1	1.3	4.7
Q2-2023	3.0	2.0	5.0
Q3-2023	3.5	1.8	3.6
Q4-2023	3.1	1.1	2.4
Q1-2024	2.9	1.8	2.5
Q2-2024	4.1	2.5	1.3
Q3-2024	4.2	2.1	2.3
Q4-2024	3.5	2.2	3.3
Q1-2025	3.4	2.2	2.4
Q2-2025	4.5	3.1	2.1
Q3-2025	4.6	3.0	2.4

Total Market Overview

Key metrics for single-family homes, condominiums and co-operatives combined for the report quarter and for year-to-date (YTD) starting from the first of the year.



Key Metrics	Historical Sparkbars	Q3-2024	Q3-2025	Percent Change	YTD 2024	YTD 2025	Percent Change
New Listings		1,186	1,176	- 0.8%	3,220	3,331	+ 3.4%
Pending Sales		868	839	- 3.3%	2,260	2,208	- 2.3%
Closed Sales		836	855	+ 2.3%	2,105	2,103	- 0.1%
Days on Market		44	49	+ 11.4%	54	59	+ 9.3%
Median Pending Price		\$455,000	\$455,000	0.0%	\$450,000	\$455,000	+ 1.1%
Median Sales Price		\$450,000	\$462,000	+ 2.7%	\$432,500	\$451,000	+ 4.3%
Pct. of Orig. Price Received		99.6%	99.2%	- 0.4%	98.8%	98.4%	- 0.4%
Housing Affordability Index		94	90	- 4.3%	97	92	- 5.2%
Inventory of Homes for Sale		955	1,059	+ 10.9%	--	--	--
Months Supply of Inventory		3.9	4.4	+ 12.8%	--	--	--