

Quarterly Indicators

Provided by OneKey® MLS

Orange County

Q3-2026

The U.S. housing market slowed during July and August, the latest third-quarter sales data available. Existing-home sales declined in both months, easing from a seasonally adjusted annual rate of 4.06 million in July to 3.98 million in August, the first reading below 4 million since June 2025, according to the National Association of REALTORS® (NAR). August sales were 1.2% below a year earlier. NAR Chief Economist Lawrence Yun said high mortgage rates contributed to the mild dip in homebuying activity, noting that mortgage rates and home sales move in opposite directions. In August, the median existing-home price rose 1.6% year-over-year to \$429,100, the 38th consecutive month of annual gains.

- Single-Family Closed Sales were up 8.7 percent to 803.
- Condos Closed Sales were down 21.7 percent to 90.
- Co-ops Closed Sales were up 100.0 percent to 6.
- Single-Family Median Sales Price increased 5.2 percent to \$510,000.
- Condos Median Sales Price increased 2.2 percent to \$326,950.
- Co-ops Median Sales Price increased 4.7 percent to \$167,000.

Borrowing costs climbed over the course of the quarter. The Federal Reserve raised the target range for the federal funds rate by a quarter point on September 16 to 3.75%–4%, its first increase since July 2023. The 30-year fixed-rate mortgage averaged 7.03% as of September 24, up from an August average of 6.67%, according to Freddie Mac. Inventory reached 1.62 million units in August, the first time it exceeded 1.6 million since November 2019, while supply rose from 4.6 months in July to 4.9 months at the current sales pace. Yun described the 4.9-month supply as the highest level in over ten years and said the ample supply is giving buyers better opportunities to negotiate. In August, pending home sales were 4.7% below a year earlier, with contract signings declining in all four regions. Nationally, contract signings are running roughly 30% below where they were in the years leading up to the pandemic, according to Yun.



Quarterly Snapshot

+ 4.9% **+ 8.6%** **+ 6.1%**

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.

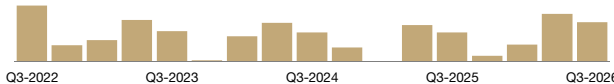
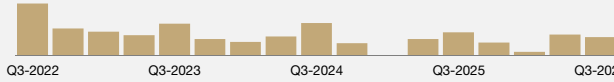
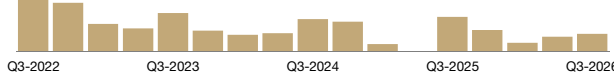
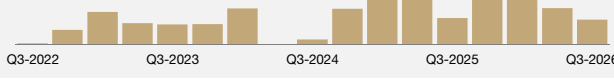
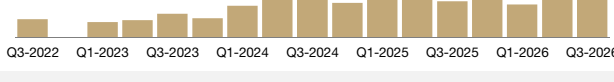
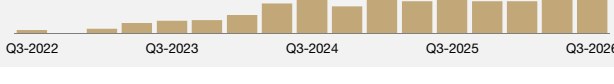
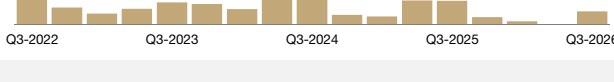
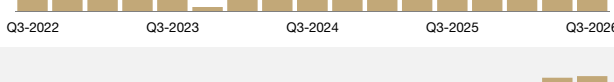
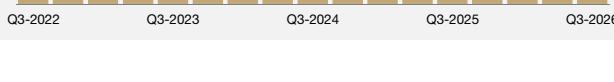


Key Metrics	Historical Sparkbars	Q3-2025	Q3-2026	Percent Change	YTD 2025	YTD 2026	Percent Change
New Listings		1,060	1,110	+ 4.7%	2,995	3,322	+ 10.9%
Pending Sales		697	798	+ 14.5%	1,888	1,999	+ 5.9%
Closed Sales		739	803	+ 8.7%	1,837	1,831	- 0.3%
Days on Market		50	52	+ 4.0%	61	61	0.0%
Median Pending Price		\$480,000	\$499,900	+ 4.1%	\$478,000	\$500,000	+ 4.6%
Median Sales Price		\$485,000	\$510,000	+ 5.2%	\$475,000	\$499,900	+ 5.2%
Pct. of Orig. Price Received		99.0%	98.8%	- 0.2%	98.3%	97.9%	- 0.4%
Housing Affordability Index		88	82	- 6.8%	90	84	- 6.7%
Inventory of Homes for Sale		1,038	1,114	+ 7.3%	--	--	--
Months Supply of Inventory		5.0	5.1	+ 2.0%	--	--	--

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.

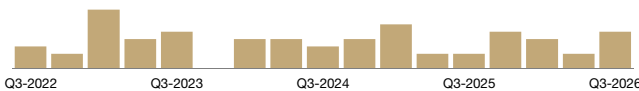
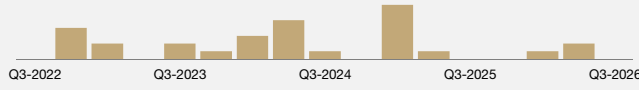
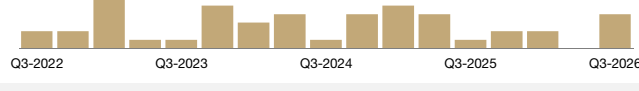
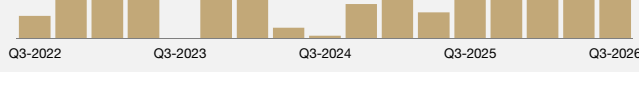
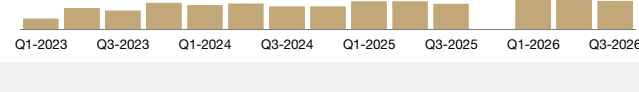
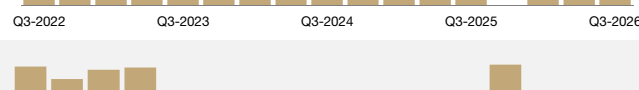
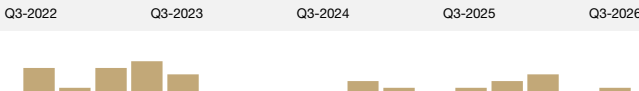


Key Metrics	Historical Sparkbars	Q3-2025	Q3-2026	Percent Change	YTD 2025	YTD 2026	Percent Change
New Listings		125	139	+ 11.2%	346	398	+ 15.0%
Pending Sales		104	96	- 7.7%	264	268	+ 1.5%
Closed Sales		115	90	- 21.7%	255	253	- 0.8%
Days on Market		40	40	0.0%	47	44	- 6.4%
Median Pending Price		\$310,000	\$330,000	+ 6.5%	\$319,000	\$326,000	+ 2.2%
Median Sales Price		\$320,000	\$326,950	+ 2.2%	\$319,000	\$320,000	+ 0.3%
Pct. of Orig. Price Received		100.1%	99.0%	- 1.1%	99.6%	98.1%	- 1.5%
Housing Affordability Index		134	129	- 3.7%	135	131	- 3.0%
Inventory of Homes for Sale		94	116	+ 23.4%	--	--	--
Months Supply of Inventory		3.2	3.9	+ 21.9%	--	--	--

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.

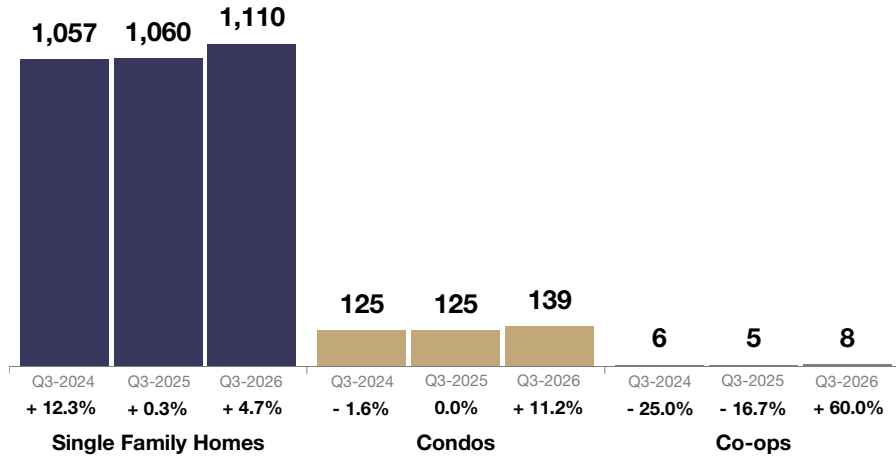


Key Metrics		Historical Sparkbars				Q3-2025	Q3-2026	Percent Change	YTD 2025	YTD 2026	Percent Change
New Listings		5	8	+ 60.0%	19	20	+ 5.3%				
Pending Sales		3	3	0.0%	17	12	- 29.4%				
Closed Sales		3	6	+ 100.0%	16	12	- 25.0%				
Days on Market		85	82	- 3.5%	65	84	+ 29.2%				
Median Pending Price		\$152,000	\$160,000	+ 5.3%	\$158,750	\$174,500	+ 9.9%				
Median Sales Price		\$159,500	\$167,000	+ 4.7%	\$159,750	\$174,500	+ 9.2%				
Pct. of Orig. Price Received		95.1%	92.8%	- 2.4%	95.7%	94.2%	- 1.6%				
Housing Affordability Index		269	252	- 6.3%	269	241	- 10.4%				
Inventory of Homes for Sale		6	6	0.0%	--	--	--				
Months Supply of Inventory		2.4	3.6	+ 50.0%	--	--	--				

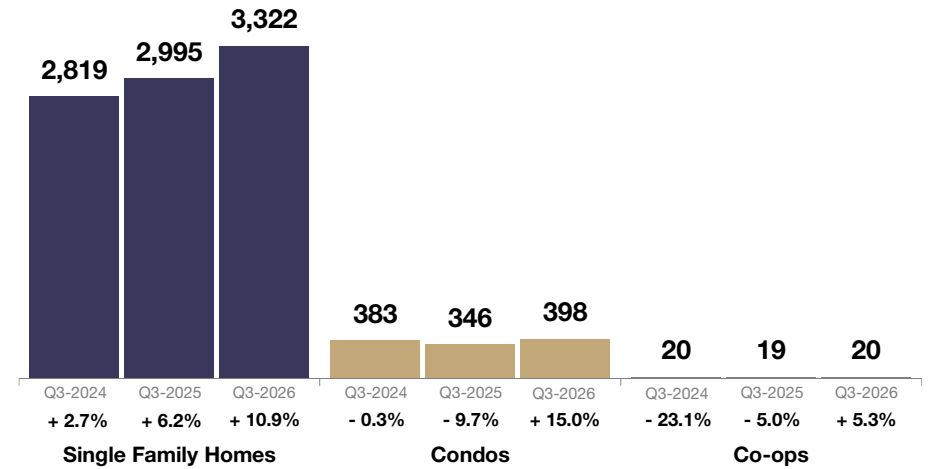
New Listings

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

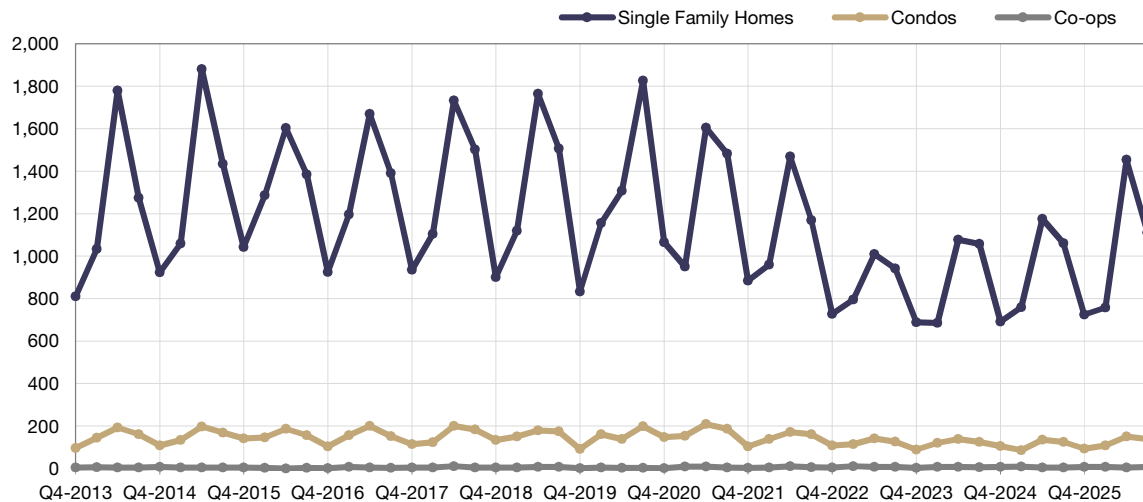
Q3-2026



Year to Date



Historical New Listings by Quarter



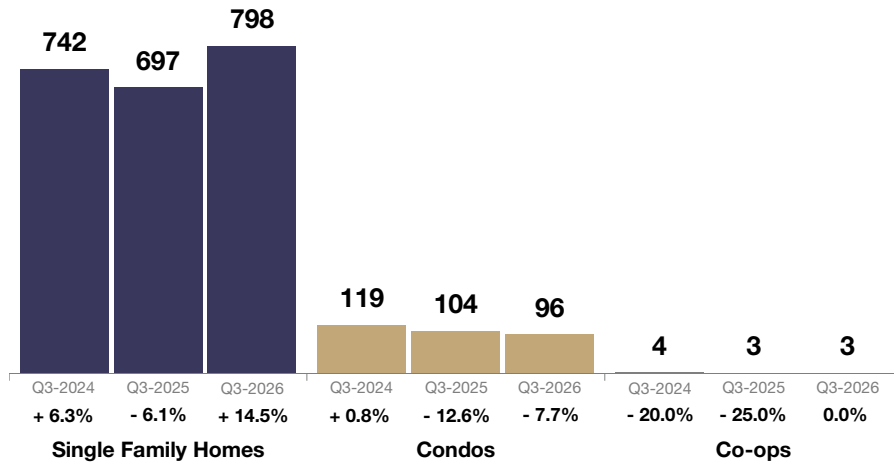
Note: If no activity occurred during a quarter, no data point is shown and the line extends to the next available data point.

Quarter	Single Family Homes	Condos	Co-ops
Q4-2023	689	88	3
Q1-2024	685	120	7
Q2-2024	1,077	138	7
Q3-2024	1,057	125	6
Q4-2024	691	105	7
Q1-2025	760	86	9
Q2-2025	1,175	135	5
Q3-2025	1,060	125	5
Q4-2025	725	94	8
Q1-2026	758	109	7
Q2-2026	1,454	150	5
Q3-2026	1,110	139	8

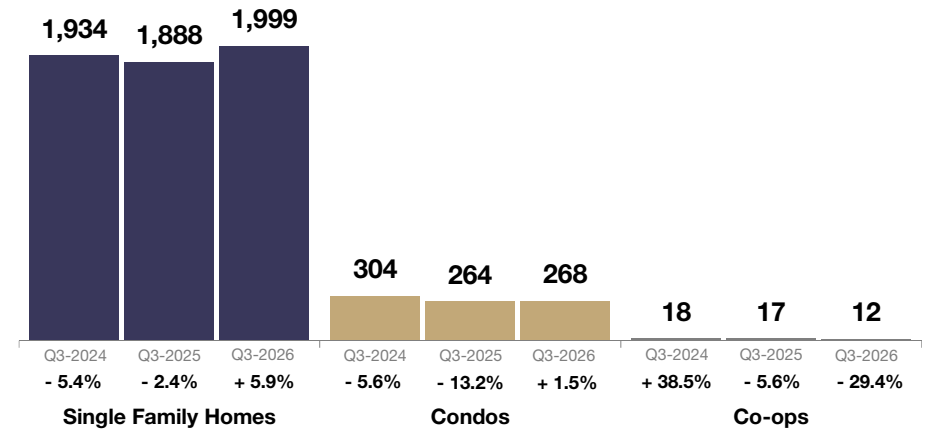
Pending Sales

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

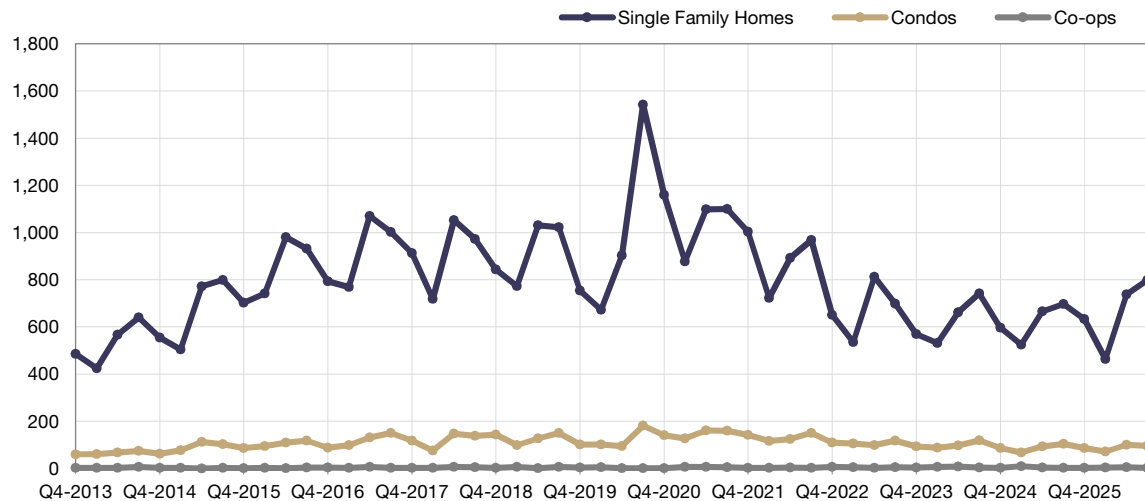
Q3-2026



Year to Date



Historical Pending Sales by Quarter



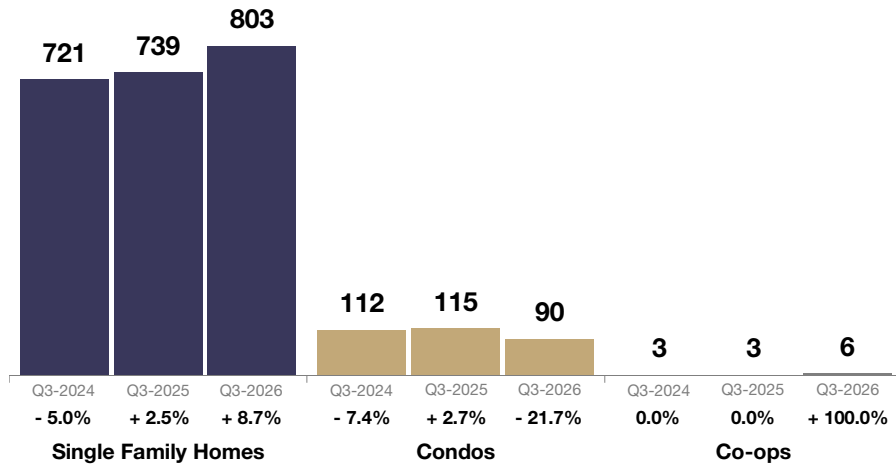
Note: If no activity occurred during a quarter, no data point is shown and the line extends to the next available data point.

Quarter	Single Family Homes	Condos	Co-ops
Q4-2023	570	93	4
Q1-2024	531	88	6
Q2-2024	661	97	8
Q3-2024	742	119	4
Q4-2024	597	86	3
Q1-2025	525	67	10
Q2-2025	666	93	4
Q3-2025	697	104	3
Q4-2025	633	87	3
Q1-2026	464	72	4
Q2-2026	737	100	5
Q3-2026	798	96	3

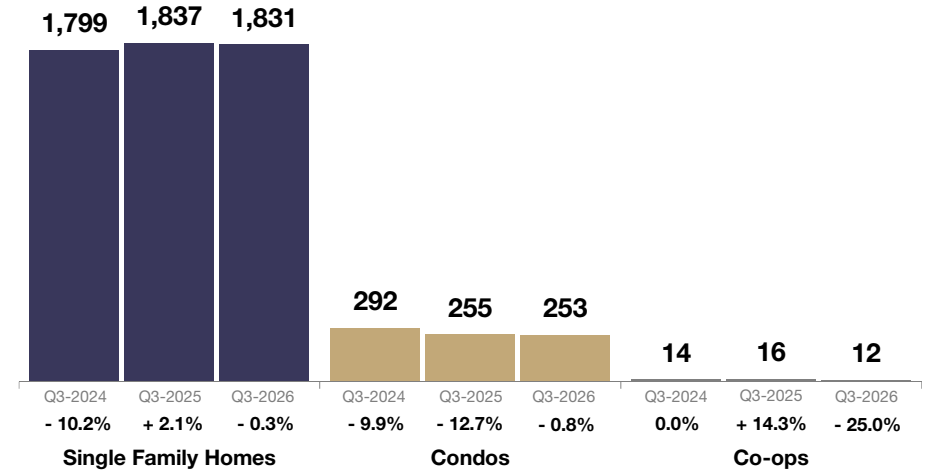
Closed Sales

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

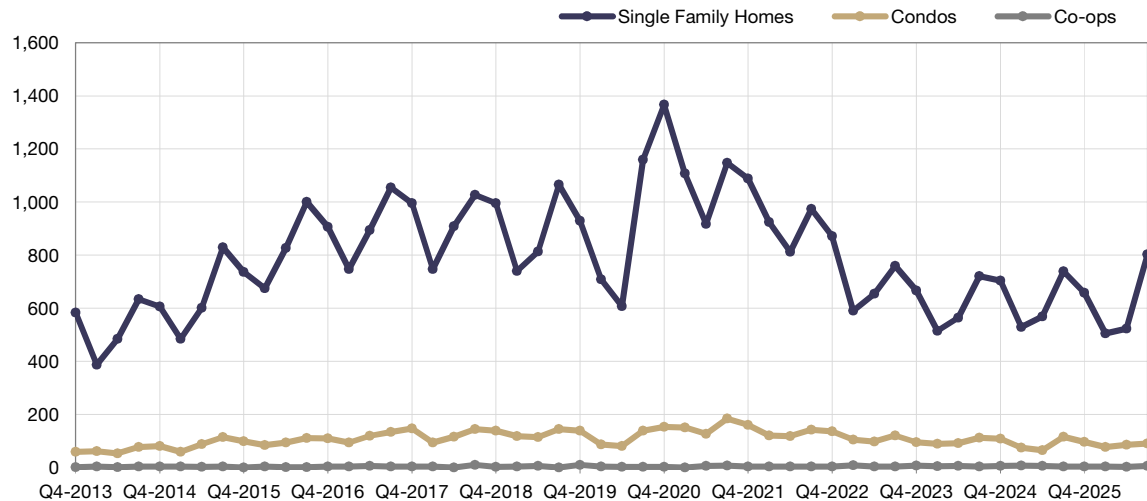
Q3-2026



Year to Date



Historical Closed Sales by Quarter



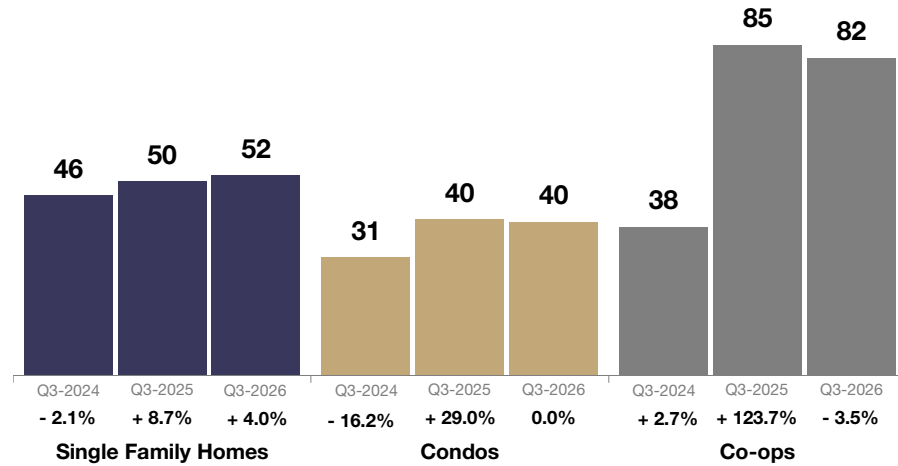
Note: If no activity occurred during a quarter, no data point is shown and the line extends to the next available data point.

Quarter	Single Family Homes	Condos	Co-ops
Q4-2023	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	529	75	7
Q2-2025	569	65	6
Q3-2025	739	115	3
Q4-2025	658	96	4
Q1-2026	505	77	4
Q2-2026	523	86	2
Q3-2026	803	90	6

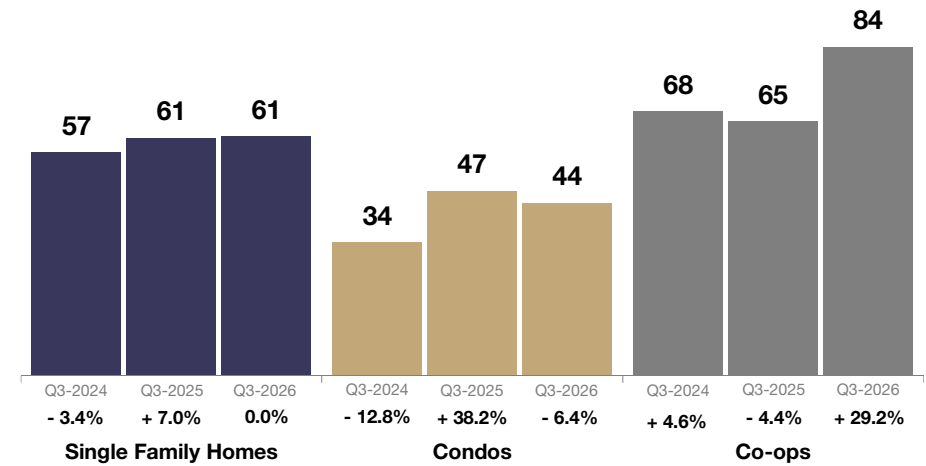
Days on Market Until Sale

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

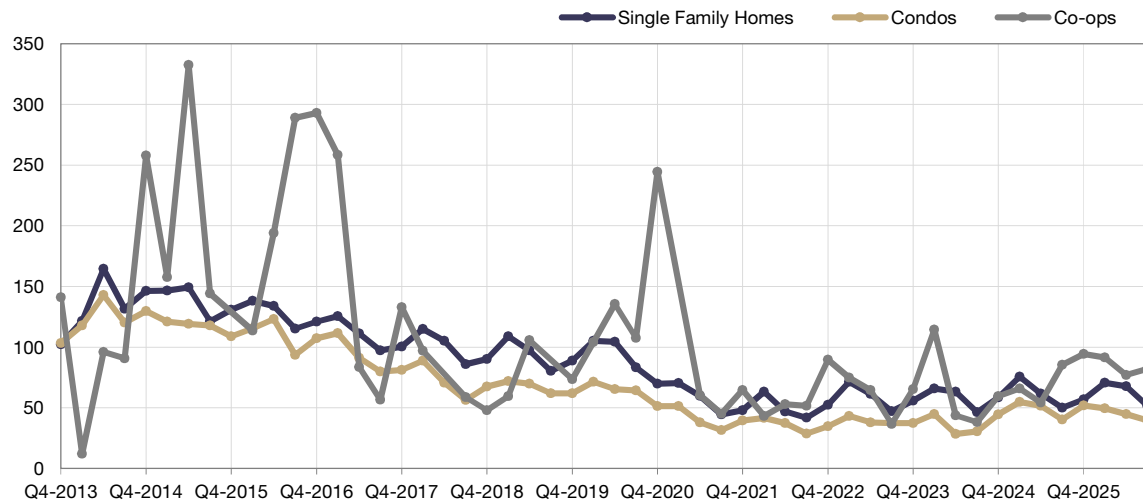
Q3-2026



Year to Date



Historical Days on Market Until Sale by Quarter



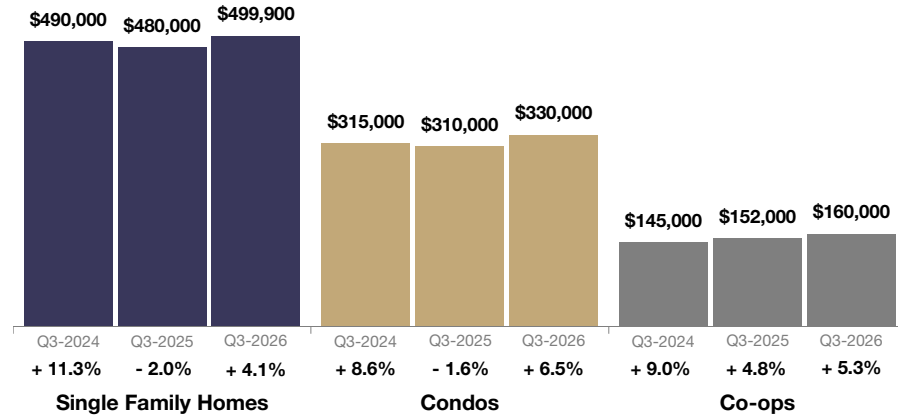
Note: If no activity occurred during a quarter, no data point is shown and the line extends to the next available data point.

Quarter	Single Family Homes	Condos	Co-ops
Q4-2023	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	52	54
Q3-2025	50	40	85
Q4-2025	57	52	95
Q1-2026	71	49	92
Q2-2026	68	45	77
Q3-2026	52	40	82

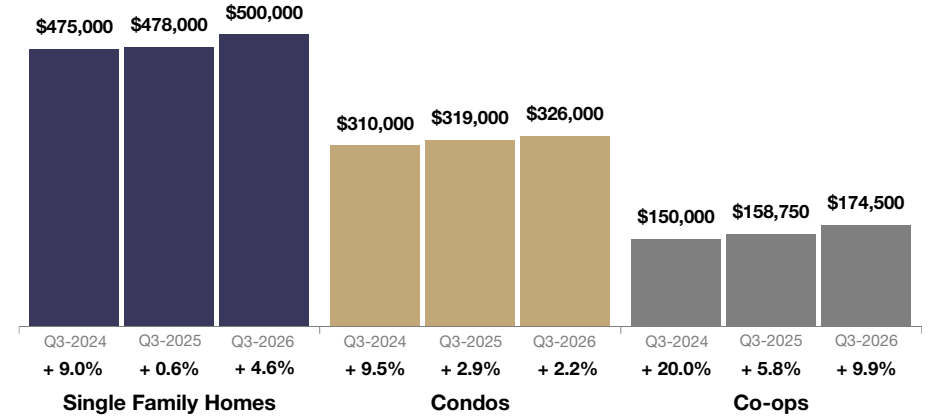
Median Pending Price

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.

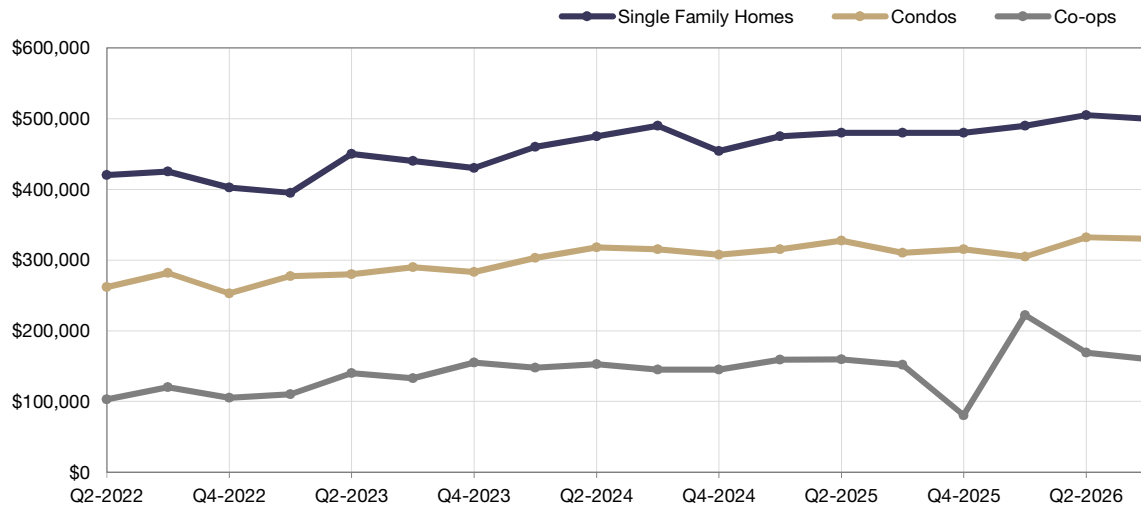
Q3-2026



Year to Date



Historical Median Pending Price by Quarter



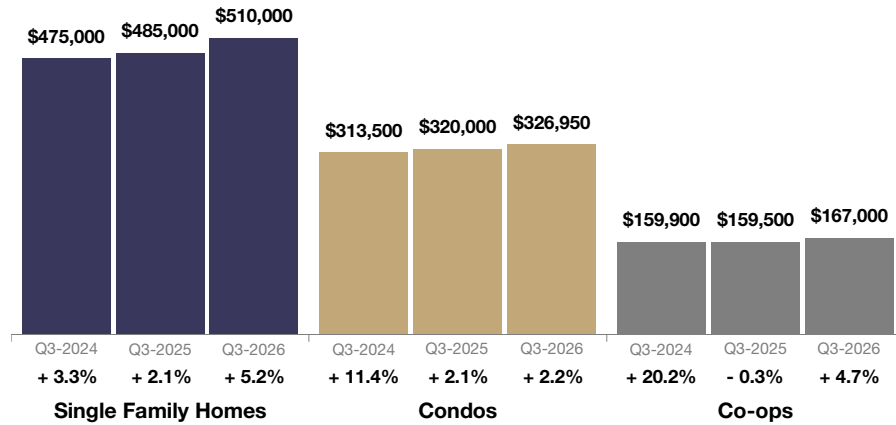
Note: If no activity occurred during a quarter, no data point is shown and the line extends to the next available data point.

Quarter	Single Family Homes	Condos	Co-ops
Q4-2023	\$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	\$454,000	\$307,500	\$145,000
Q1-2025	\$475,000	\$315,000	\$159,000
Q2-2025	\$480,000	\$327,500	\$159,500
Q3-2025	\$480,000	\$310,000	\$152,000
Q4-2025	\$480,000	\$315,000	\$80,500
Q1-2026	\$490,000	\$305,000	\$222,000
Q2-2026	\$505,000	\$332,125	\$169,000
Q3-2026	\$499,900	\$330,000	\$160,000

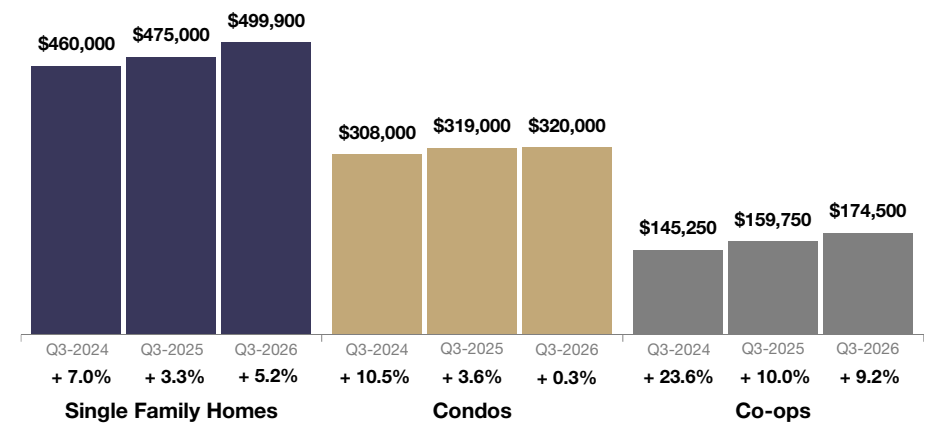
Median Sales Price

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

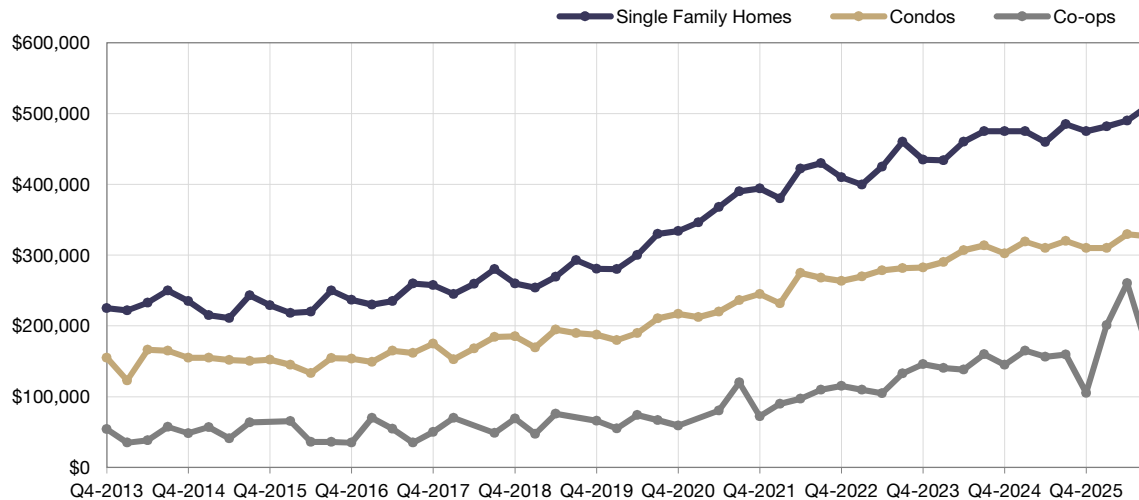
Q3-2026



Year to Date



Historical Median Sales Price by Quarter



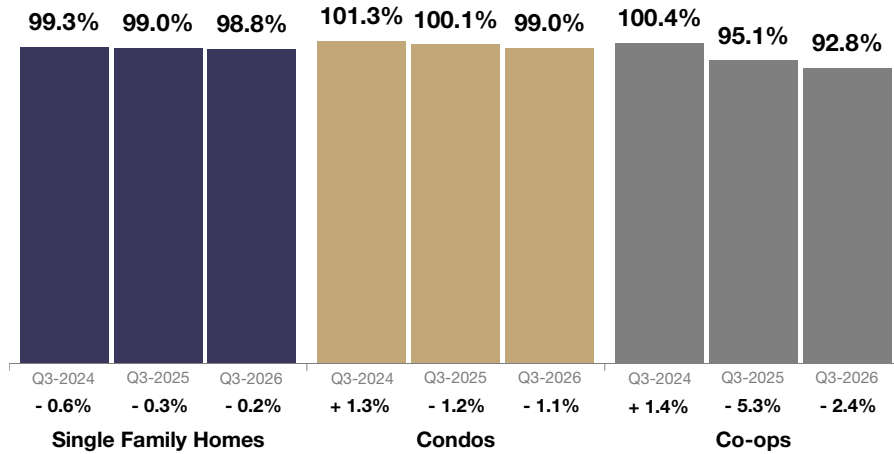
Quarter	Single Family Homes	Condos	Co-ops
Q4-2023	\$435,000	\$282,500	\$146,000
Q1-2024	\$433,900	\$290,000	\$140,500
Q2-2024	\$460,000	\$307,000	\$138,500
Q3-2024	\$475,000	\$313,500	\$159,900
Q4-2024	\$475,000	\$302,500	\$145,000
Q1-2025	\$475,000	\$319,000	\$165,000
Q2-2025	\$459,900	\$310,000	\$156,500
Q3-2025	\$485,000	\$320,000	\$159,500
Q4-2025	\$475,000	\$310,000	\$105,250
Q1-2026	\$482,000	\$310,000	\$201,000
Q2-2026	\$490,000	\$329,500	\$260,500
Q3-2026	\$510,000	\$326,950	\$167,000

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

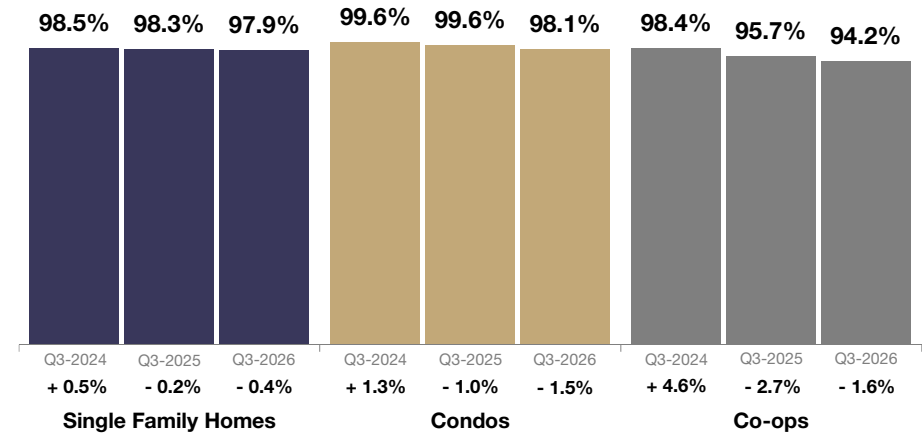
Percent of Original List Price Received

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.

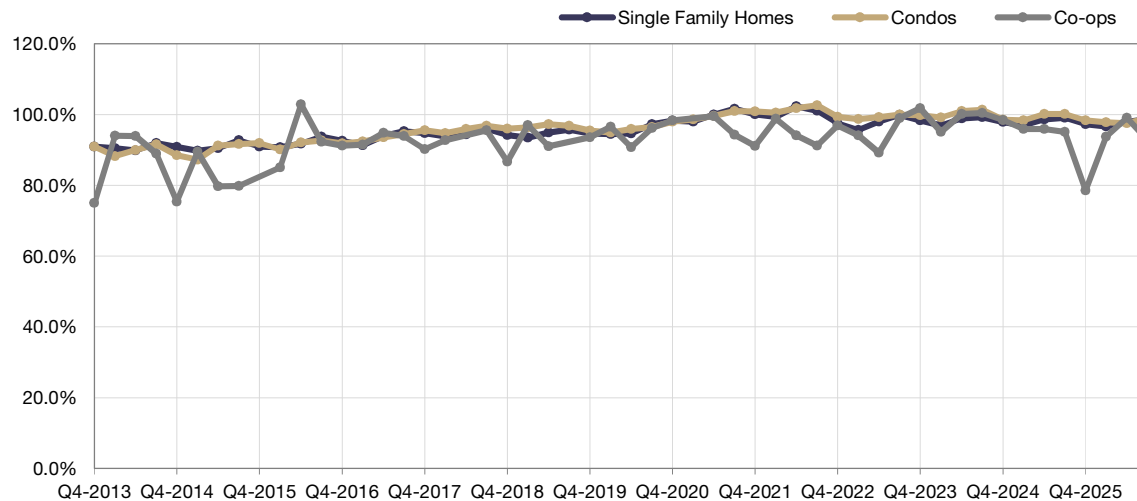
Q3-2026



Year to Date



Historical Percent of Original List Price Received by Quarter

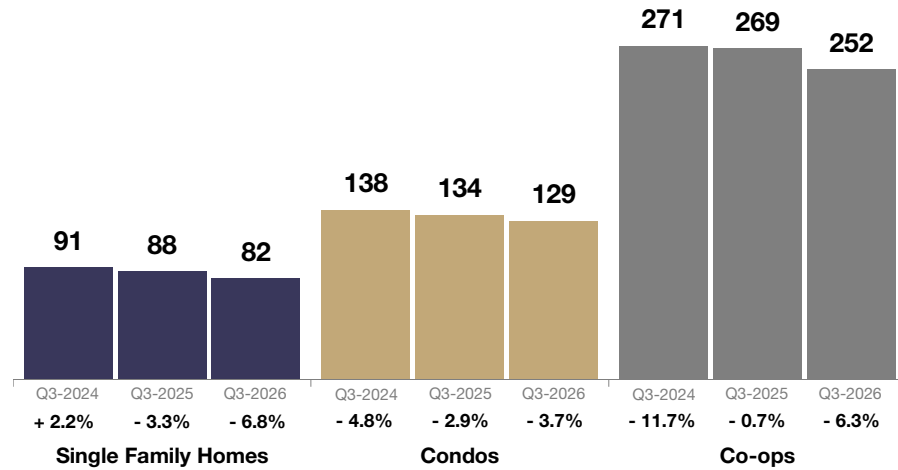


Quarter	Single Family Homes	Condos	Co-ops
Q4-2023	98.3%	99.8%	101.8%
Q1-2024	96.9%	99.2%	95.1%
Q2-2024	98.9%	101.0%	100.2%
Q3-2024	99.3%	101.3%	100.4%
Q4-2024	97.9%	98.6%	98.5%
Q1-2025	96.9%	98.4%	95.9%
Q2-2025	98.6%	100.2%	95.9%
Q3-2025	99.0%	100.1%	95.1%
Q4-2025	97.3%	98.3%	78.6%
Q1-2026	96.6%	97.8%	93.7%
Q2-2026	97.9%	97.5%	99.1%
Q3-2026	98.8%	99.0%	92.8%

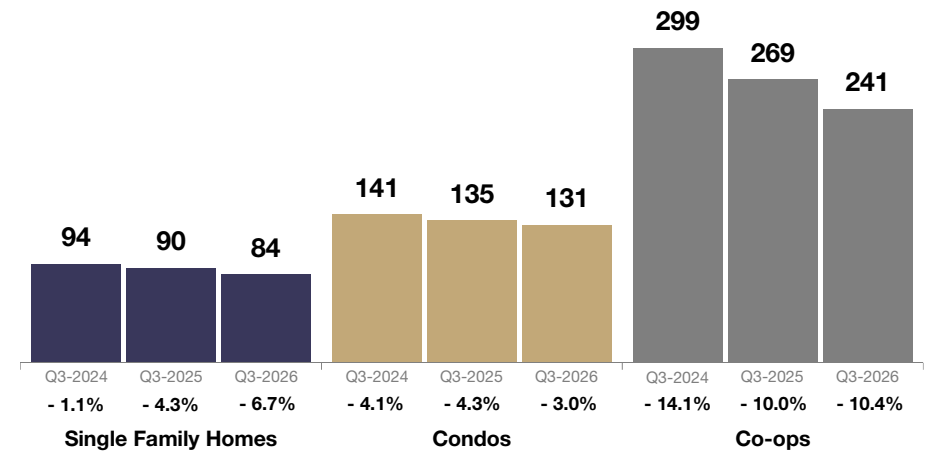
Housing Affordability Index

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.

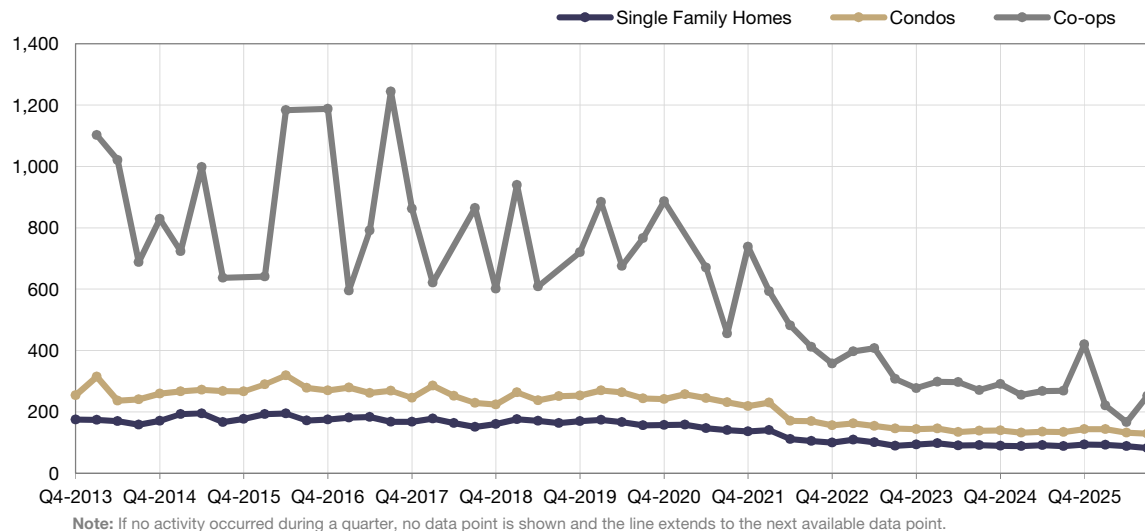
Q3-2026



Year to Date



Historical Housing Affordability Index by Quarter

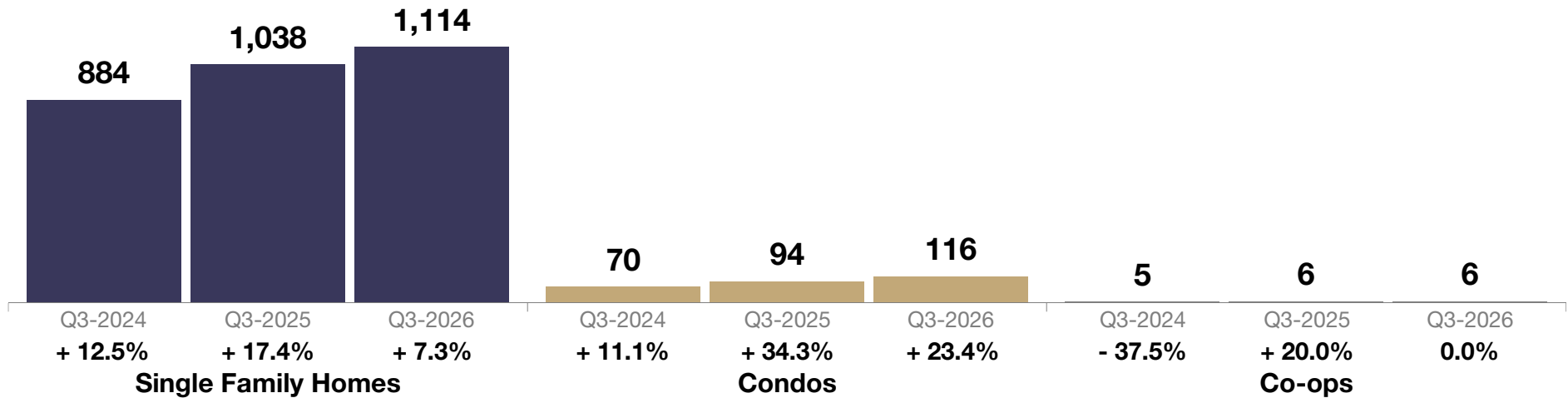


Quarter	Single Family Homes	Condos	Co-ops
Q4-2023	93	143	277
Q1-2024	97	145	298
Q2-2024	90	134	297
Q3-2024	91	138	271
Q4-2024	89	139	291
Q1-2025	88	132	255
Q2-2025	91	135	268
Q3-2025	88	134	269
Q4-2025	93	143	420
Q1-2026	92	143	221
Q2-2026	88	132	166
Q3-2026	82	129	252

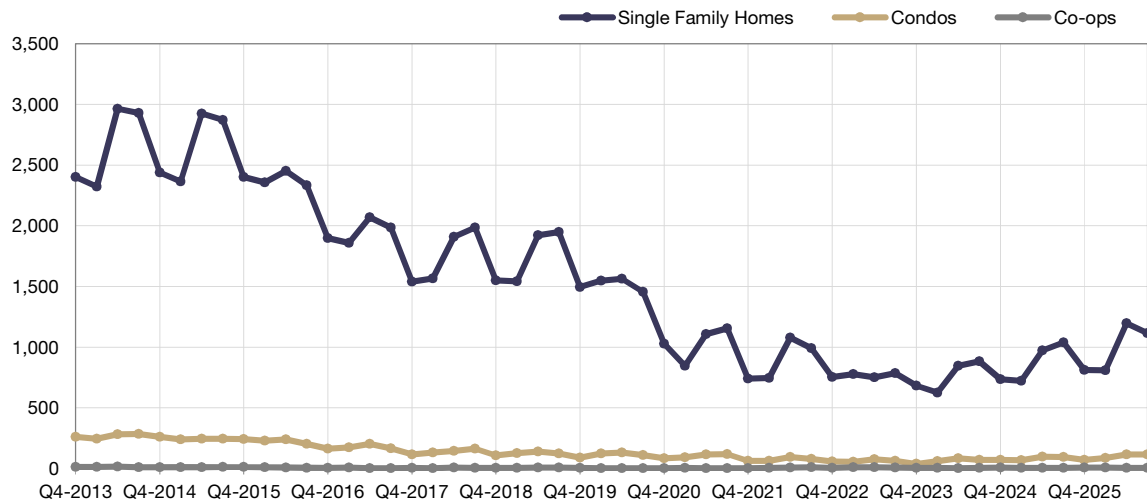
Inventory of Homes for Sale

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

Q3-2026



Historical Inventory of Homes for Sale by Quarter



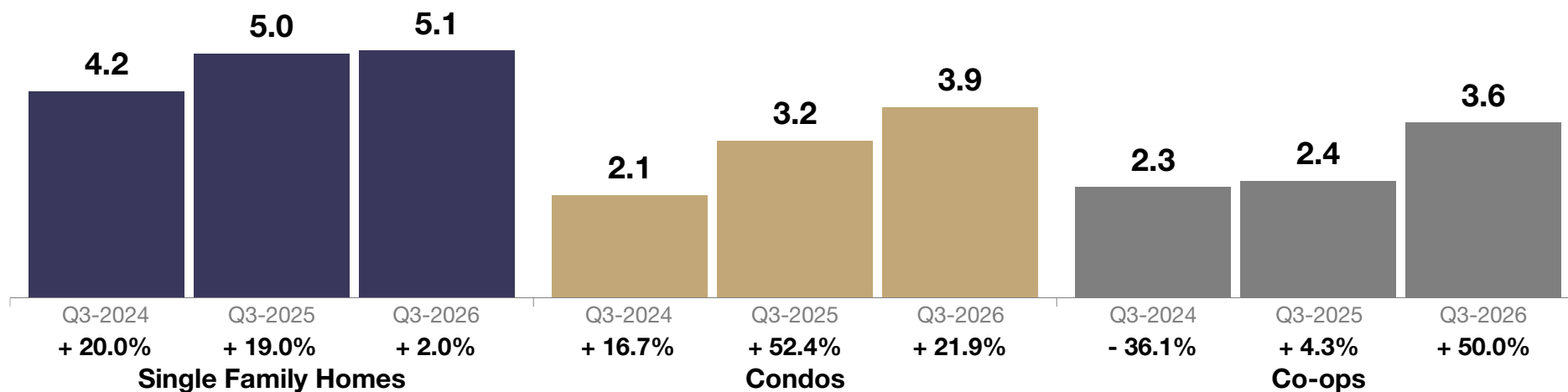
Note: If no activity occurred during a quarter, no data point is shown and the line extends to the next available data point.

Quarter	Single Family Homes	Condos	Co-ops
Q4-2023	682	38	5
Q1-2024	625	60	5
Q2-2024	845	84	3
Q3-2024	884	70	5
Q4-2024	735	71	7
Q1-2025	722	68	6
Q2-2025	974	96	5
Q3-2025	1,038	94	6
Q4-2025	812	72	7
Q1-2026	808	88	8
Q2-2026	1,198	115	4
Q3-2026	1,114	116	6

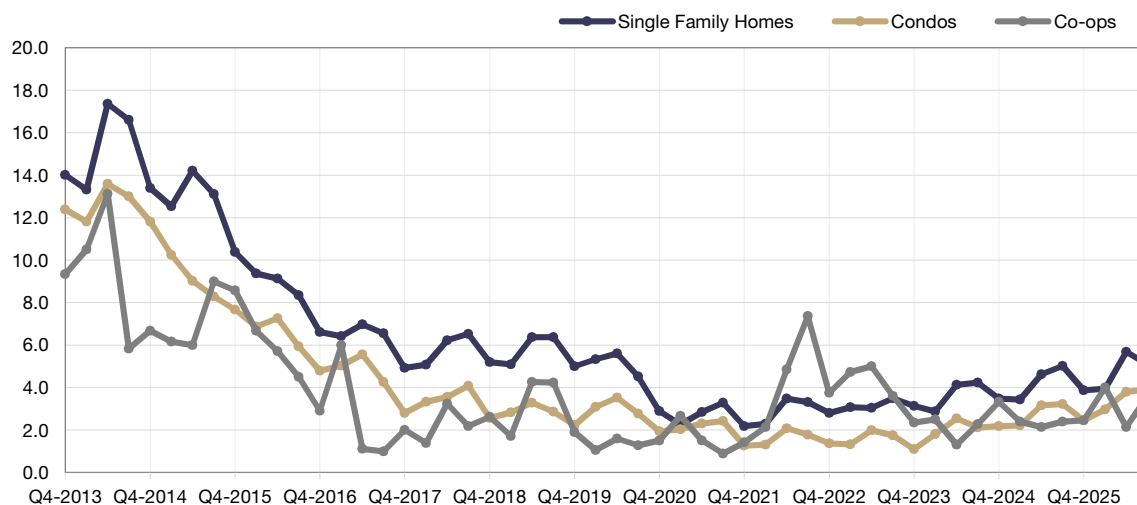
Months Supply of Inventory

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.

Q3-2026



Historical Months Supply of Inventory by Quarter

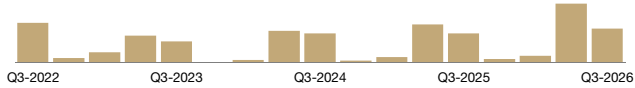
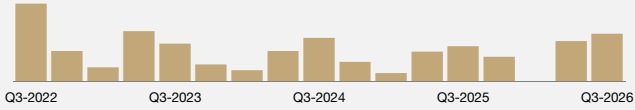
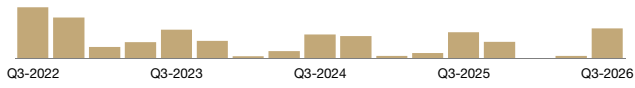
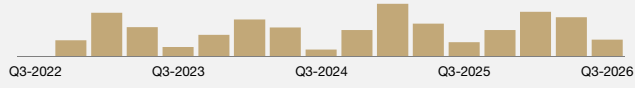
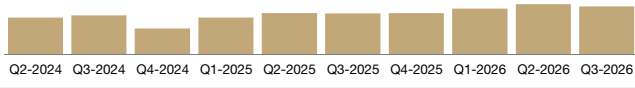
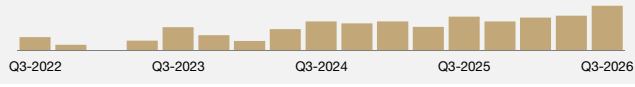
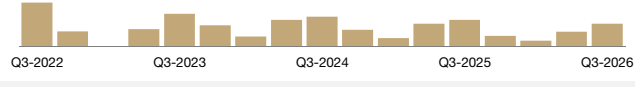
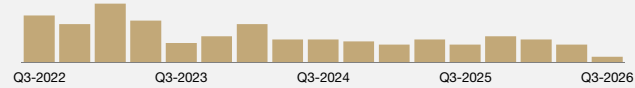
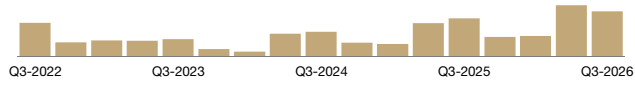
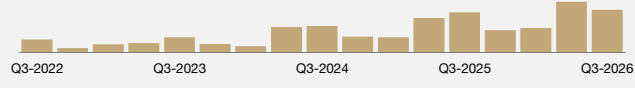


Note: If no activity occurred during a quarter, no data point is shown and the line extends to the next available data point.

Quarter	Single Family Homes	Condos	Co-ops
Q4-2023	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	4.6	3.2	2.1
Q3-2025	5.0	3.2	2.4
Q4-2025	3.9	2.5	2.5
Q1-2026	3.9	3.0	4.0
Q2-2026	5.7	3.8	2.1
Q3-2026	5.1	3.9	3.6

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	Q3-2025	Q3-2026	Percent Change	YTD 2025	YTD 2026	Percent Change
New Listings		1,190	1,257	+ 5.6%	3,360	3,740	+ 11.3%
Pending Sales		804	897	+ 11.6%	2,169	2,279	+ 5.1%
Closed Sales		857	899	+ 4.9%	2,108	2,096	- 0.6%
Days on Market		49	51	+ 4.1%	59	59	0.0%
Median Pending Price		\$459,000	\$475,000	+ 3.5%	\$455,700	\$475,000	+ 4.2%
Median Sales Price		\$462,000	\$489,998	+ 6.1%	\$450,500	\$475,000	+ 5.4%
Pct. of Orig. Price Received		99.2%	98.7%	- 0.5%	98.4%	97.9%	- 0.5%
Housing Affordability Index		93	86	- 7.5%	95	88	- 7.4%
Inventory of Homes for Sale		1,138	1,236	+ 8.6%	--	--	--
Months Supply of Inventory		4.8	4.9	+ 2.1%	--	--	--