

April 2025 Housing Market Report

Prepared by Bright Research

Data as of May 6, 2025

Key Market Statistics	Apr 2025	Apr 2024	Change	YTD 2025	YTD 2024	Change
Closed Sales	1,480	1,518	-2.5%	4,496	4,820	-6.7%
Median Sold Price	\$499,000	\$480,000	+4.0%	\$489,000	\$471,000	+3.8%
Median Days on Market	8 days	6 days	+2 days	12 days	10 days	+2 days
New Pending Sales	1,820	1,731	+5.1%	5,502	5,686	-3.2%
New Listings	1,937	1,924	+0.7%	7,177	6,834	+5.0%
Active Listings	2,737	2,077	+31.8%	2,737	2,077	+31.8%
Months of Supply	1.98	1.53	+0.45 mos.	1.98	1.53	+0.45 mos.
Showings	27,599	28,887	-4.5%	93,696	102,725	-8.8%

Housing Market Trends

Spring market starting to bloom in North Central Virginia. The North Central Virginia market outperformed the overall Mid-Atlantic area in April. There was a total of 1,820 new pending sales across North Central Virginia, a 5.1% increase over last year. Prince William, Spotsylvania, Stafford and Frederick counties all had more new contracts compared to a year ago.

Buyers ready to make a purchase have more inventory to choose from now. The number of active listings at the end of April 2025 was 31.8% higher than April 2024.

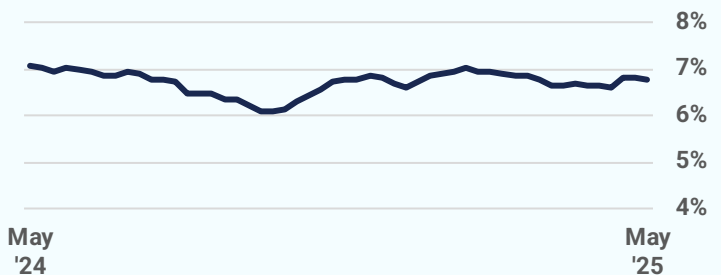
More supply has given buyers somewhat more leverage. However, inventory is still constrained with active listings still only about half (53%) of the level in April 2019.

Price growth has been unrelenting. In April 2025, the median home price in North Central Virginia hit a new record high. Prices rose 4.0% year-over-year.

Market Outlook

The North Central Virginia market will be influenced by nearby D.C. metro trends and the fallout from DOGE and federal workforce cuts. The region has weathered those headwinds so far, with a relatively strong outlook for spring. Uncertainty in the economy and a decline in consumer confidence could dampen some of the typical busy spring market activity.

Weekly Avg. Mortgage Rate 30-yr fixed rate



Source: Freddie Mac

Closed Sales

2025

2024

2020-2023 Range

1,480

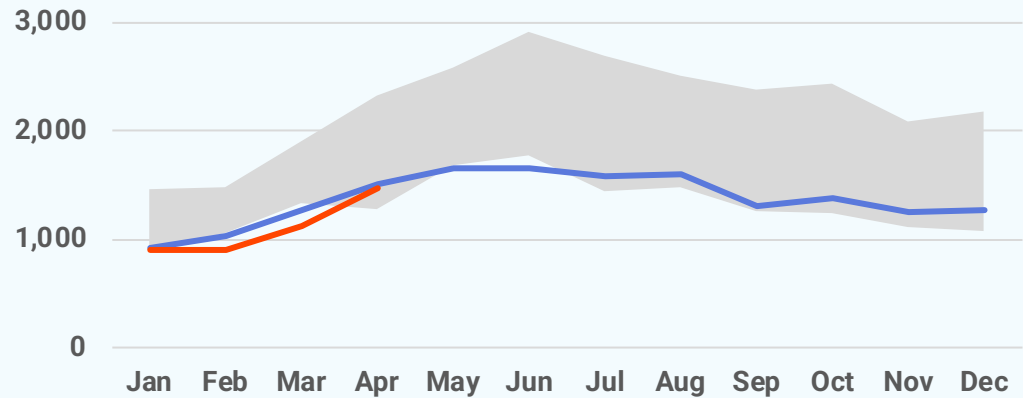
April 2025

-2.5%

Apr '25 vs. Apr '24
(Apr '24: 1,518)

+30.9%

Apr '25 vs. Mar '25
(Mar '25: 1,131)



Median Sold Price

2025

2024

2023

2022

2021

2020

\$499,000

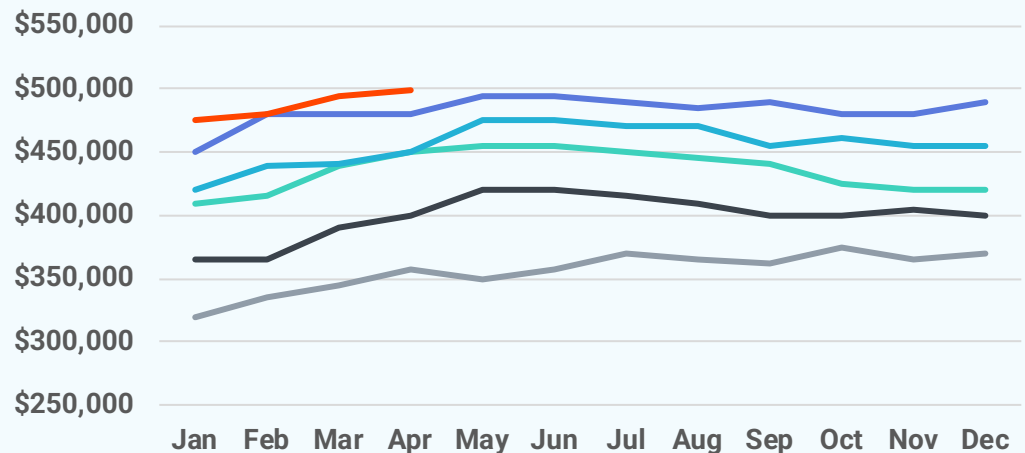
April 2025

+4.0%

Apr '25 vs. Apr '24
(Apr '24: \$480,000)

+0.8%

Apr '25 vs. Mar '25
(Mar '25: \$495,000)



Median Days on Market

8 days

April 2025

+2 days

Apr '25 vs. Apr '24
(Apr '24: 6 days)

-4 days

Apr '25 vs. Mar '25
(Mar '25: 12 days)



New Pending Sales

2025

2024

2020-2023 Range

1,820

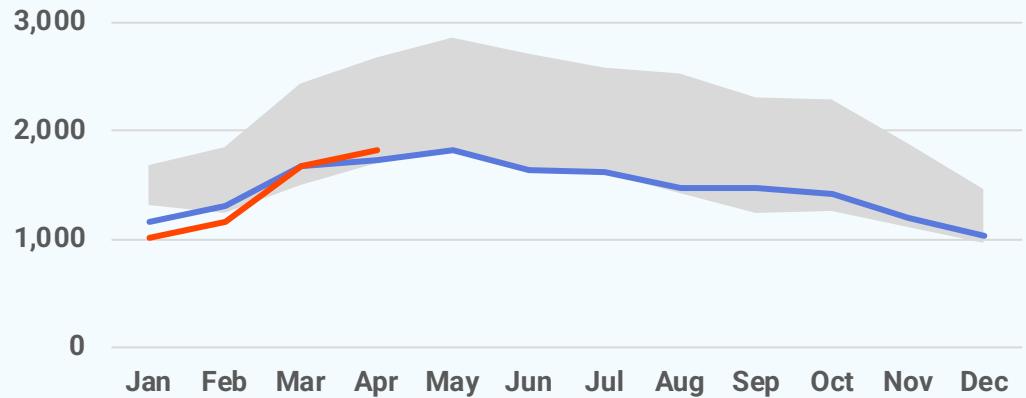
April 2025

+5.1%

Apr '25 vs. Apr '24
(Apr '24: 1,731)

+9.1%

Apr '25 vs. Mar '25
(Mar '25: 1,668)



New Listings

2025

2024

2020-2023 Range

1,937

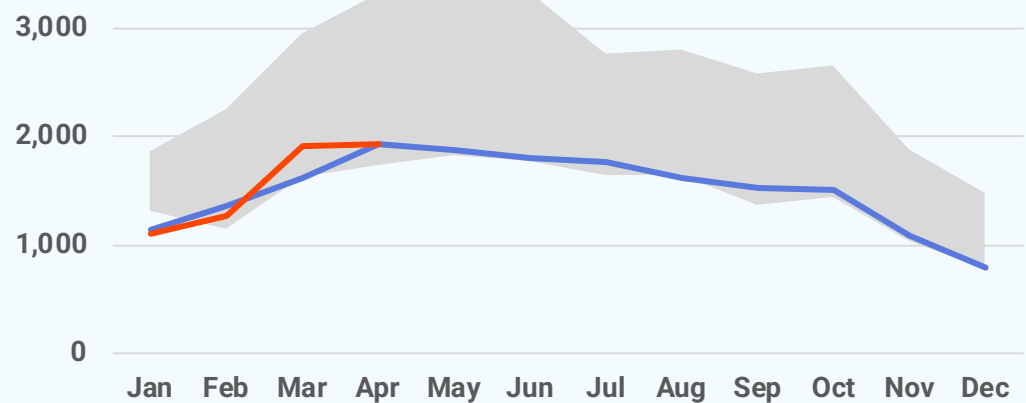
April 2025

+0.7%

Apr '25 vs. Apr '24
(Apr '24: 1,924)

+1.5%

Apr '25 vs. Mar '25
(Mar '25: 1,908)



Active Listings

2,737

April 2025

+31.8%

Apr '25 vs. Apr '24
(Apr '24: 2,077)

+13.0%

Apr '25 vs. Mar '25
(Mar '25: 2,423)



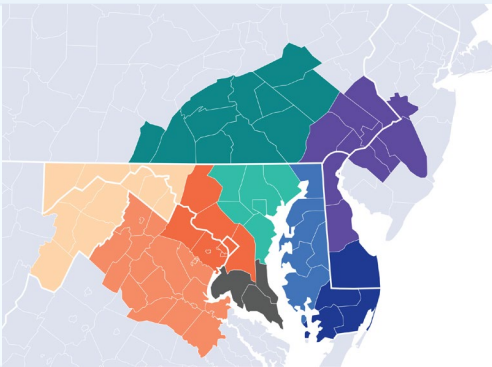
Local Markets	Closed Sales		Median Sales Price		Median Days on Market	
	Apr '25	vs. Apr '24	Apr '25	vs. Apr '24	Apr '25	vs. Apr '24
North Central VA	1,480	-2.5%	\$499,000	+4.0%	8 days	+2 days
Caroline County, VA	39	+5.4%	\$369,000	+2.8%	27 days	+10 days
Clarke County, VA	15	+15.4%	\$600,000	+33.3%	8 days	-2 days
Culpeper County, VA	53	+15.2%	\$500,000	+13.3%	17 days	+7 days
Fauquier County, VA	77	-3.8%	\$585,000	+3.7%	5 days	-3 days
Frederick County, VA	124	-8.1%	\$429,990	+0.3%	16 days	+9 days
Fredericksburg City, VA	27	+0.0%	\$455,000	+3.4%	5 days	-1 day
King George County, VA	25	-28.6%	\$440,000	-7.4%	14 days	-1 day
Madison County, VA	5	-72.2%	\$515,000	+23.4%	19 days	+11 days
Manassas City, VA	40	+8.1%	\$450,000	+5.9%	8 days	+3 days
Manassas Park City, VA	21	-22.2%	\$510,000	-1.1%	11 days	+2 days
Orange County, VA	82	+41.4%	\$415,000	+4.4%	13 days	-6 days
Page County, VA	21	-34.4%	\$300,000	+14.1%	24 days	+12 days
Prince William County, VA	515	+11.7%	\$593,000	+4.0%	6 days	+1 day
Rappahannock County, VA	4	-20.0%	\$682,000	+39.5%	147 days	+136 days
Shenandoah County, VA	55	-3.5%	\$325,000	+1.6%	10 days	-3 days
Spotsylvania County, VA	156	-5.5%	\$458,150	+4.1%	9 days	+2 days
Stafford County, VA	150	-25.0%	\$539,000	+4.3%	6 days	+1 day
Warren County, VA	43	-24.6%	\$355,000	-7.6%	13 days	+5 days
Winchester City, VA	28	+0.0%	\$390,648	+2.1%	6 days	-3 days

Local Markets	New Pending Sales		New Listings		Showings	
	Apr '25	vs. Apr '24	Apr '25	vs. Apr '24	Apr '25	vs. Apr '24
North Central VA	1,820	+5.1%	1,937	+0.7%	27,599	-4.5%
Caroline County, VA	59	+34.1%	51	-3.8%	407	+6.5%
Clarke County, VA	20	-4.8%	29	+52.6%	285	+0.4%
Culpeper County, VA	58	+3.6%	64	-24.7%	758	+24.7%
Fauquier County, VA	100	+9.9%	107	+12.6%	1,333	-3.9%
Frederick County, VA	173	+26.3%	141	-12.4%	2,089	+7.6%
Fredericksburg City, VA	27	-10.0%	31	-16.2%	430	-16.0%
King George County, VA	38	-15.6%	26	-43.5%	322	-34.8%
Madison County, VA	14	+16.7%	24	+4.3%	121	+51.3%
Manassas City, VA	46	+0.0%	44	-2.2%	712	+17.1%
Manassas Park City, VA	17	-34.6%	17	-10.5%	297	-34.9%
Orange County, VA	72	-11.1%	89	+8.5%	682	+20.1%
Page County, VA	24	-22.6%	35	-22.2%	299	-0.7%
Prince William County, VA	567	+7.0%	612	+6.6%	10,537	-10.3%
Rappahannock County, VA	6	+100.0%	9	-30.8%	133	+129.3%
Shenandoah County, VA	58	-4.9%	63	-17.1%	701	+4.0%
Spotsylvania County, VA	205	+5.7%	223	+12.6%	2,867	-21.2%
Stafford County, VA	235	+9.8%	258	+10.7%	3,948	+14.7%
Warren County, VA	64	-4.5%	78	+11.4%	1,192	+2.1%
Winchester City, VA	37	-11.9%	36	-28.0%	486	-10.7%

Local Markets	Active Listings		Months of Supply	
	Apr '25	vs. Apr '24	Apr '25	vs. Apr '24
North Central VA	2,737	+31.8%	1.98	+0.45 months
Caroline County, VA	88	+8.6%	2.26	+0.23 months
Clarke County, VA	35	+34.6%	2.69	+0.96 months
Culpeper County, VA	143	+34.9%	2.70	+0.44 months
Fauquier County, VA	175	+32.6%	2.33	+0.5 months
Frederick County, VA	269	+15.0%	2.10	+0.05 months
Fredericksburg City, VA	51	+13.3%	2.22	+0.26 months
King George County, VA	45	-33.8%	1.55	-0.58 months
Madison County, VA	45	+55.2%	4.50	+1.86 months
Manassas City, VA	59	+145.8%	1.59	+0.97 months
Manassas Park City, VA	21	+200.0%	1.31	+0.9 months
Orange County, VA	167	+36.9%	2.88	+0.66 months
Page County, VA	70	+2.9%	3.50	+0.26 months
Prince William County, VA	614	+55.8%	1.42	+0.48 months
Rappahannock County, VA	31	+24.0%	5.17	+1 months
Shenandoah County, VA	113	+28.4%	2.35	+0.62 months
Spotsylvania County, VA	324	+30.6%	2.13	+0.45 months
Stafford County, VA	337	+48.5%	2.15	+0.78 months
Warren County, VA	113	+8.7%	2.31	+0.05 months
Winchester City, VA	37	-24.5%	1.28	-0.68 months

Local Market Map

- MD/WV Panhandle
- North Central Virginia
- Washington D.C., Metro Area
- Central Pennsylvania
- Baltimore Metro Area
- Southern Maryland
- Maryland Eastern Shore
- Philadelphia Metro Area
- Del/Mar Coastal



About Bright MLS

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Please contact **Christy Reap**,
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interview or information requests:

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- christy.reap@brightmls.com

April 2025 Detached Single-Family Home Report

Prepared by Bright Research

Data as of May 6, 2025

Key Market Statistics	Apr 2025	Apr 2024	Change
Closed Sales	1,087	1,125	-3.4%
Median Sold Price	\$540,000	\$515,000	+4.9%
Median Days on Market	8 days	7 days	+1 day
New Pending Sales	1,368	1,306	+4.7%
New Listings	1,507	1,483	+1.6%
Active Listings	2,250	1,754	+28.3%
Months of Supply	2.19	1.73	+0.46 mos.

Closed Sales

202520242020-2023 Range

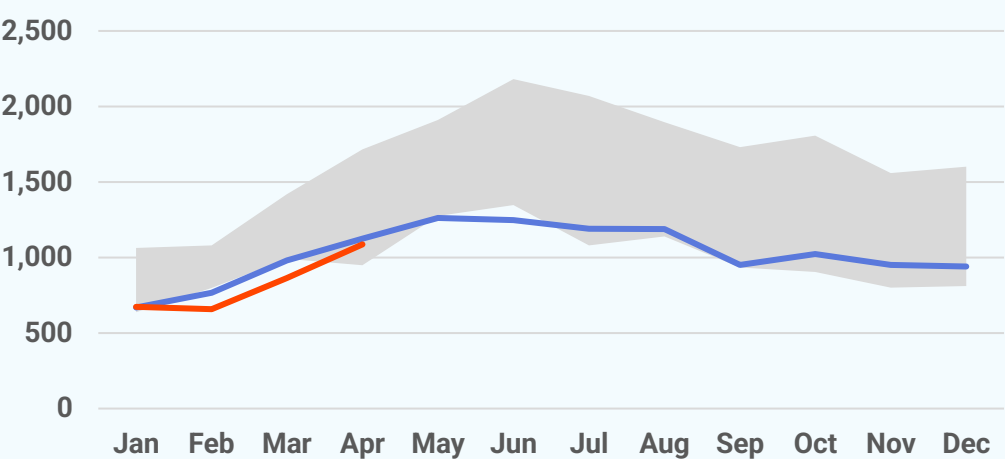
1,087
April 2025

-3.4%

Apr '25 vs. Apr '24
(Apr '24: 1,125)

+25.8%

Apr '25 vs. Mar '25
(Mar '25: 864)



Median Sold Price

2025

2024

2023

2022

2021

2020

\$540,000

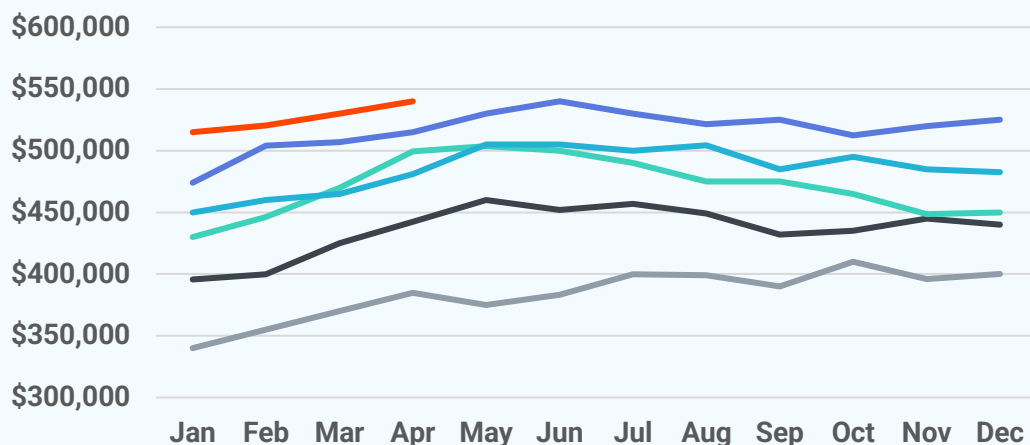
April 2025

+4.9%

Apr '25 vs. Apr '24
(Apr '24: \$515,000)

+1.9%

Apr '25 vs. Mar '25
(Mar '25: \$530,000)



Median Days on Market

8 days

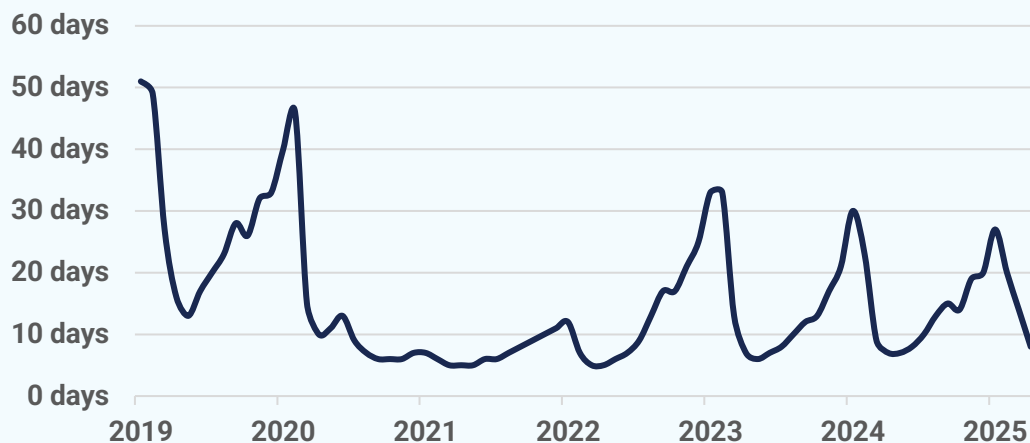
April 2025

+1 day

Apr '25 vs. Apr '24
(Apr '24: 7 days)

-6 days

Apr '25 vs. Mar '25
(Mar '25: 14 days)



New Pending Sales

2025

2024

2020-2023 Range

1,368

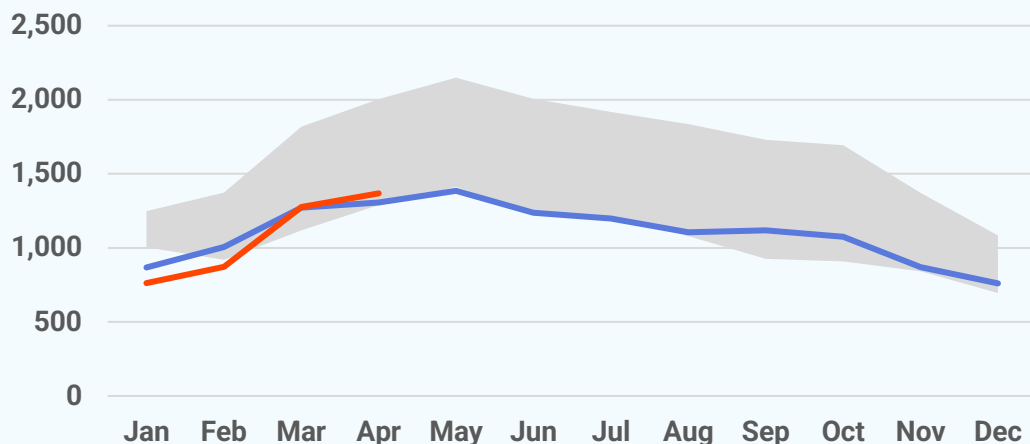
April 2025

+4.7%

Apr '25 vs. Apr '24
(Apr '24: 1,306)

+7.1%

Apr '25 vs. Mar '25
(Mar '25: 1,277)



New Listings

2025

2024

2020-2023 Range

1,507

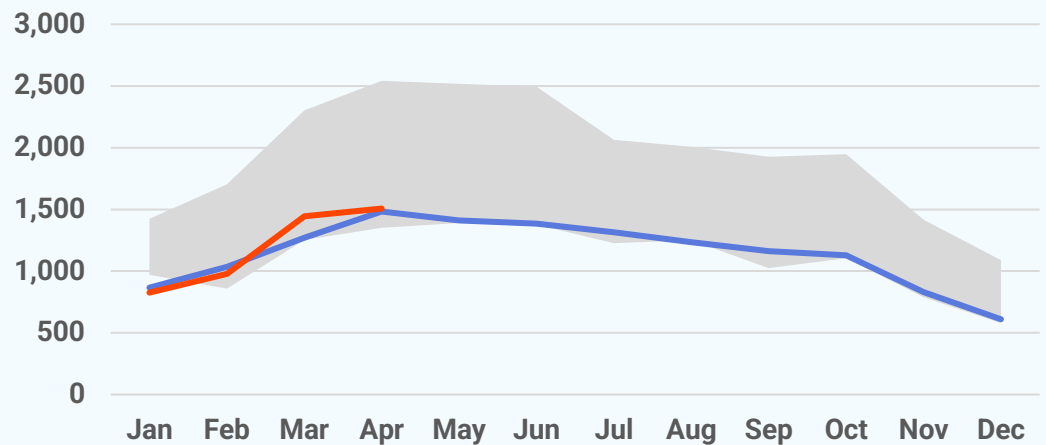
April 2025

+1.6%

Apr '25 vs. Apr '24
(Apr '24: 1,483)

+4.4%

Apr '25 vs. Mar '25
(Mar '25: 1,444)



Active Listings

2,250

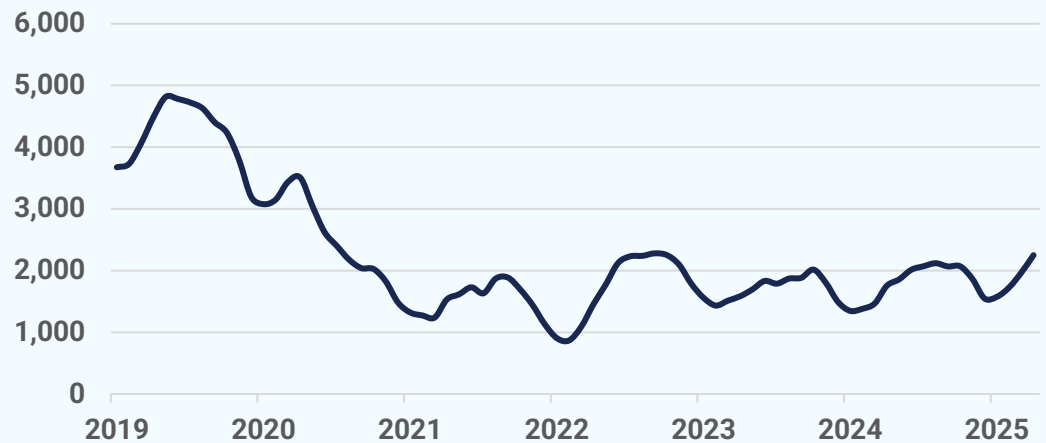
April 2025

+28.3%

Apr '25 vs. Apr '24
(Apr '24: 1,754)

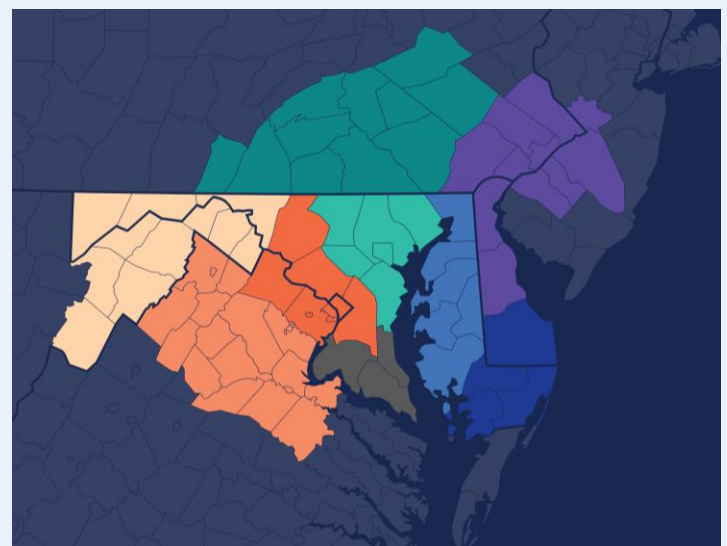
+14.4%

Apr '25 vs. Mar '25
(Mar '25: 1,967)



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April 2025 Attached/Townhomes Report

Prepared by Bright Research

Data as of May 6, 2025

Key Market Statistics	Apr 2025	Apr 2024	Change
Closed Sales	288	278	+3.6%
Median Sold Price	\$440,000	\$425,000	+3.5%
Median Days on Market	6 days	5 days	+1 day
New Pending Sales	341	295	+15.6%
New Listings	318	334	-4.8%
Active Listings	334	242	+38.0%
Months of Supply	1.26	0.96	+0.30 mos.

Closed Sales

202520242020-2023 Range

288

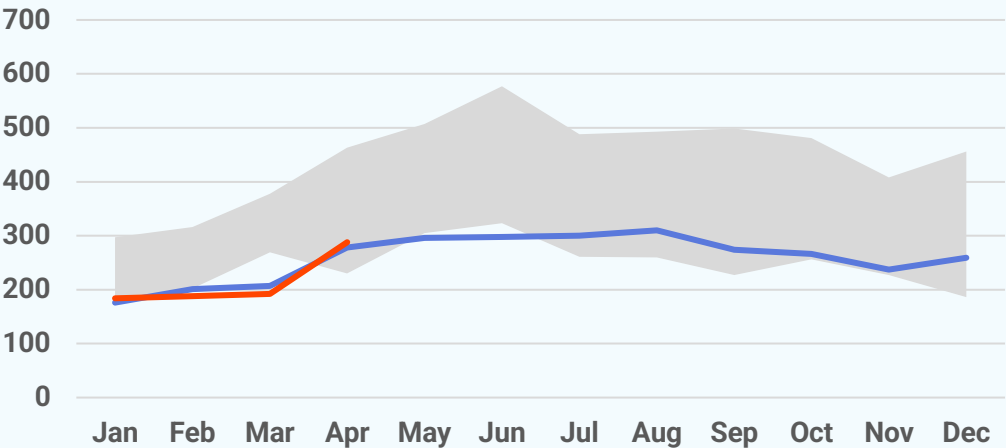
April 2025

+3.6%

Apr '25 vs. Apr '24
(Apr '24: 278)

+50.0%

Apr '25 vs. Mar '25
(Mar '25: 192)



Median Sold Price

2025

2024

2023

2022

2021

2020

\$440,000

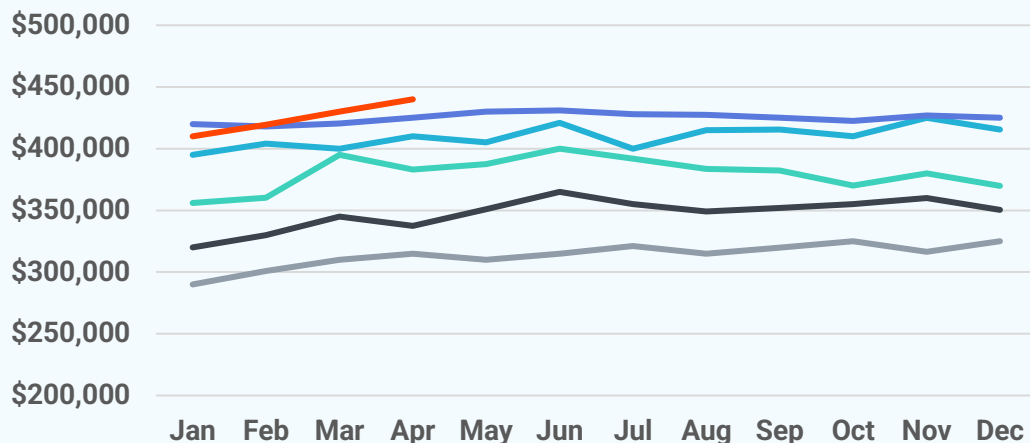
April 2025

+3.5%

Apr '25 vs. Apr '24
(Apr '24: \$425,000)

+2.3%

Apr '25 vs. Mar '25
(Mar '25: \$430,000)



Median Days on Market

6 days

April 2025

+1 day

Apr '25 vs. Apr '24
(Apr '24: 5 days)

-1 day

Apr '25 vs. Mar '25
(Mar '25: 7 days)



New Pending Sales

2025

2024

2020-2023 Range

341

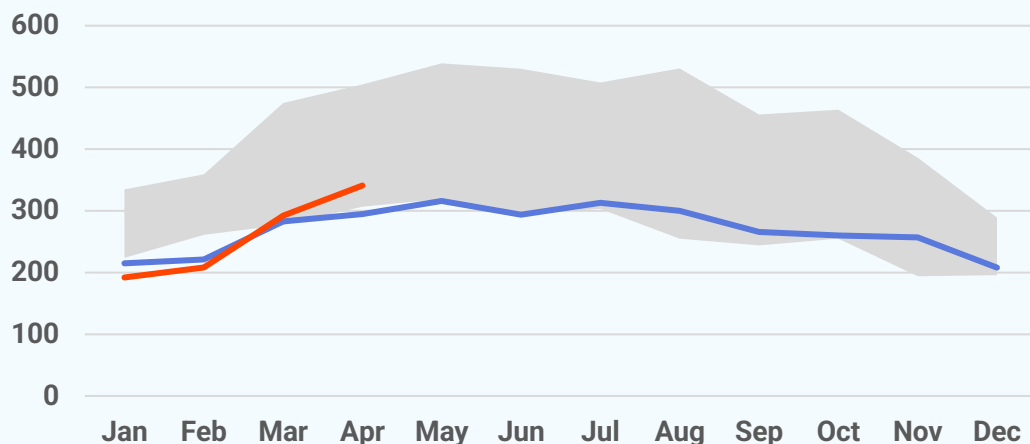
April 2025

+15.6%

Apr '25 vs. Apr '24
(Apr '24: 295)

+16.8%

Apr '25 vs. Mar '25
(Mar '25: 292)



New Listings

2025

2024

2020-2023 Range

318

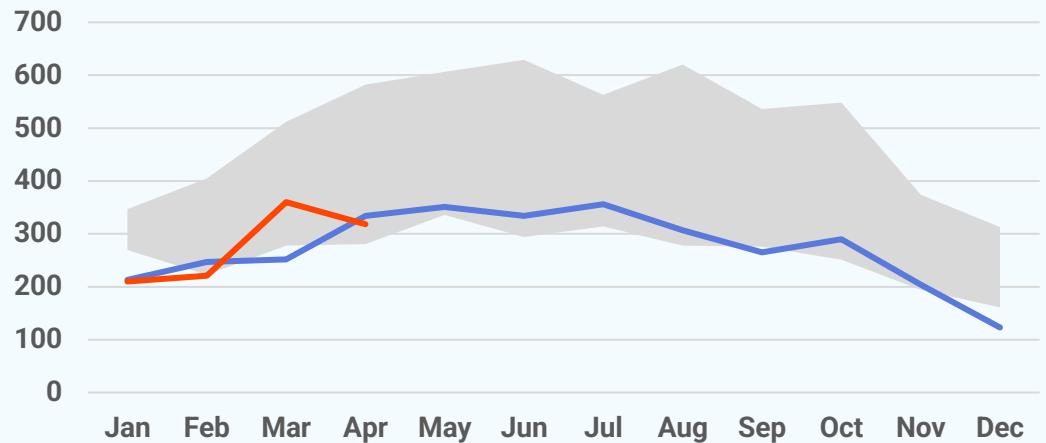
April 2025

-4.8%

Apr '25 vs. Apr '24
(Apr '24: 334)

-11.7%

Apr '25 vs. Mar '25
(Mar '25: 360)



Active Listings

334

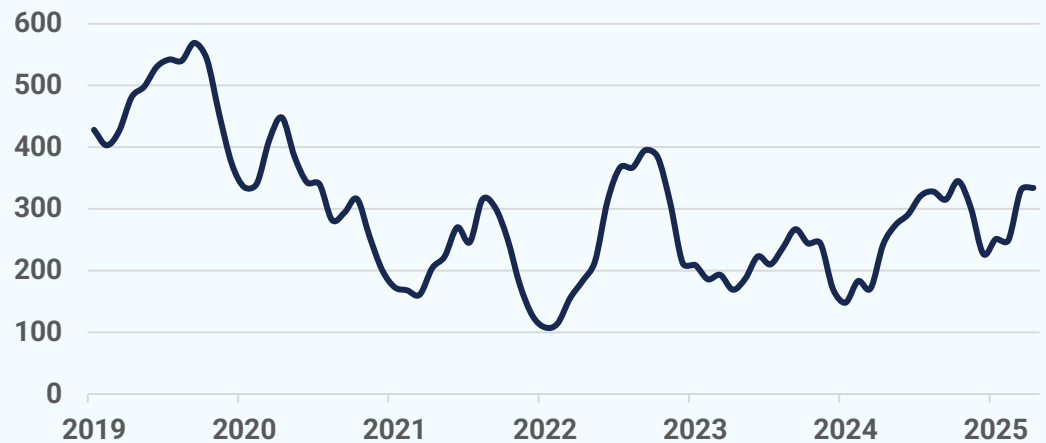
April 2025

+38.0%

Apr '25 vs. Apr '24
(Apr '24: 242)

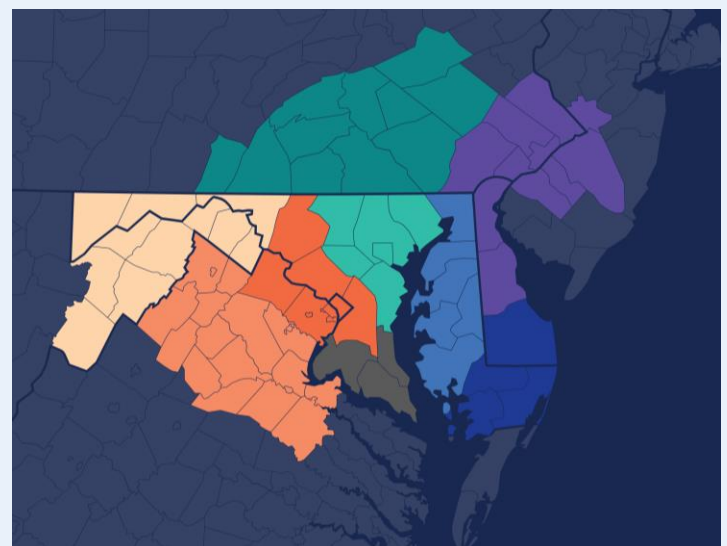
+1.2%

Apr '25 vs. Mar '25
(Mar '25: 330)



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April 2025 Condos Report

Prepared by Bright Research

Data as of May 6, 2025

Key Market Statistics	Apr 2025	Apr 2024	Change
Closed Sales	105	115	-8.7%
Median Sold Price	\$405,000	\$386,000	+4.9%
Median Days on Market	14 days	6 days	+8 days
New Pending Sales	111	130	-14.6%
New Listings	111	107	+3.7%
Active Listings	153	81	+88.9%
Months of Supply	1.76	0.91	+0.85 mos.

Closed Sales

202520242020-2023 Range

105

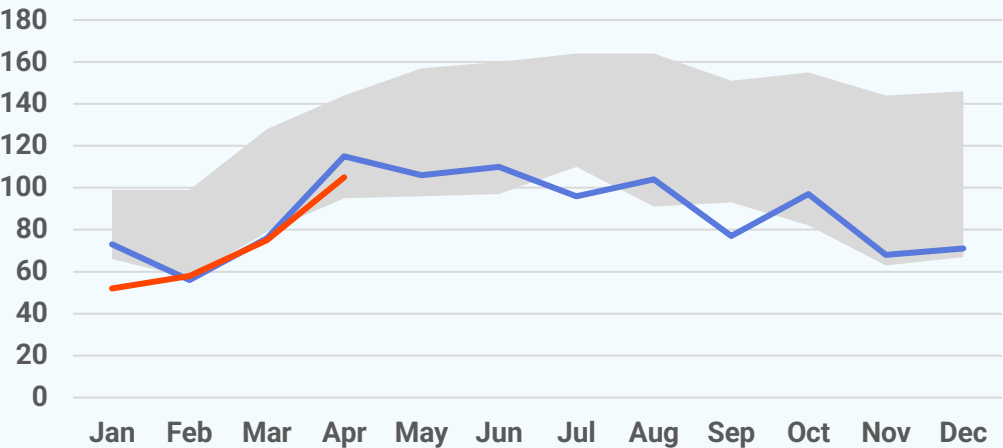
April 2025

-8.7%

Apr '25 vs. Apr '24
(Apr '24: 115)

+40.0%

Apr '25 vs. Mar '25
(Mar '25: 75)



Median Sold Price

2025

2024

2023

2022

2021

2020

\$405,000

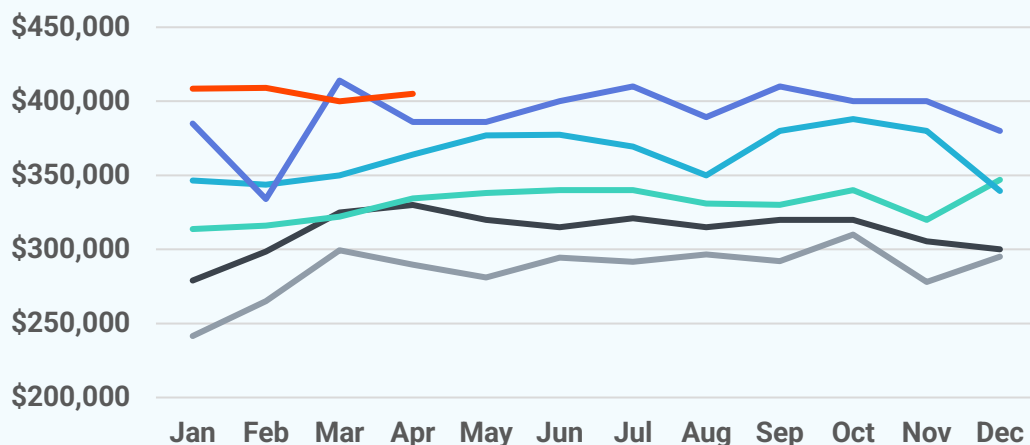
April 2025

+4.9%

Apr '25 vs. Apr '24
(Apr '24: \$386,000)

+1.3%

Apr '25 vs. Mar '25
(Mar '25: \$400,000)



Median Days on Market

14 days

April 2025

+8 days

Apr '25 vs. Apr '24
(Apr '24: 6 days)

+4 days

Apr '25 vs. Mar '25
(Mar '25: 10 days)



New Pending Sales

2025

2024

2020-2023 Range

111

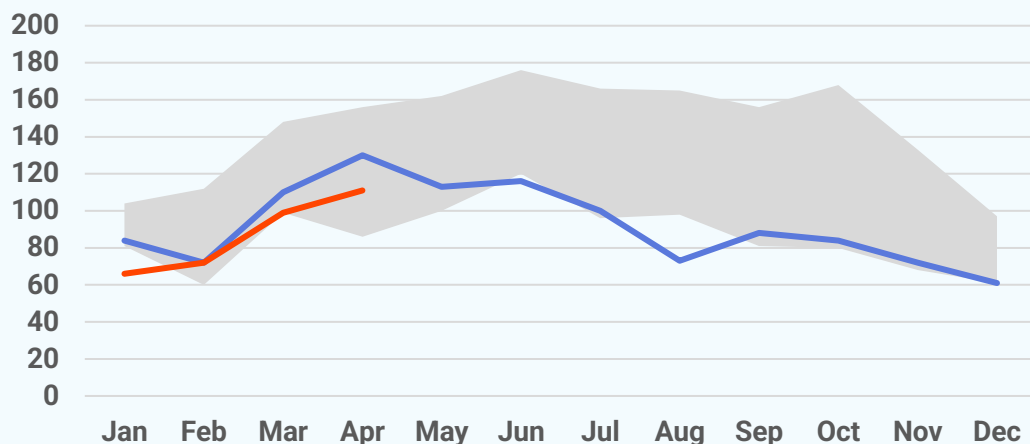
April 2025

-14.6%

Apr '25 vs. Apr '24
(Apr '24: 130)

+12.1%

Apr '25 vs. Mar '25
(Mar '25: 99)



New Listings

2025

2024

2020-2023 Range

111

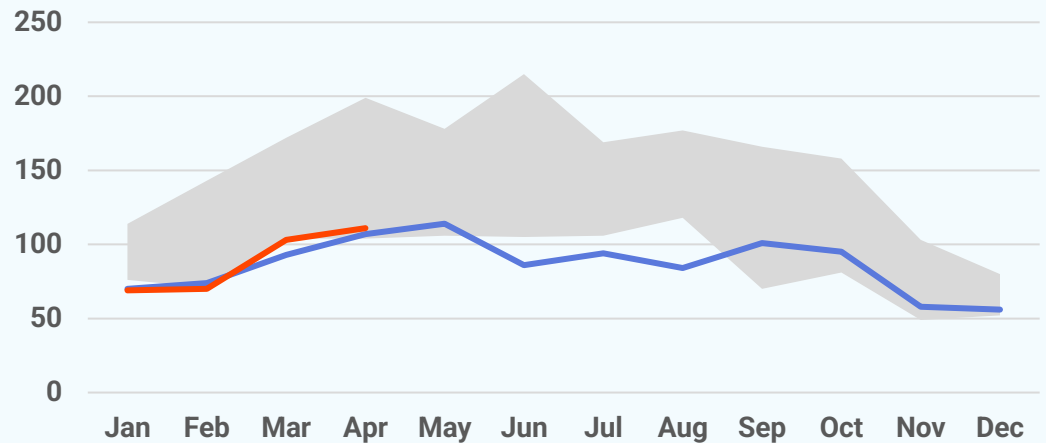
April 2025

+3.7%

Apr '25 vs. Apr '24
(Apr '24: 107)

+7.8%

Apr '25 vs. Mar '25
(Mar '25: 103)



Active Listings

153

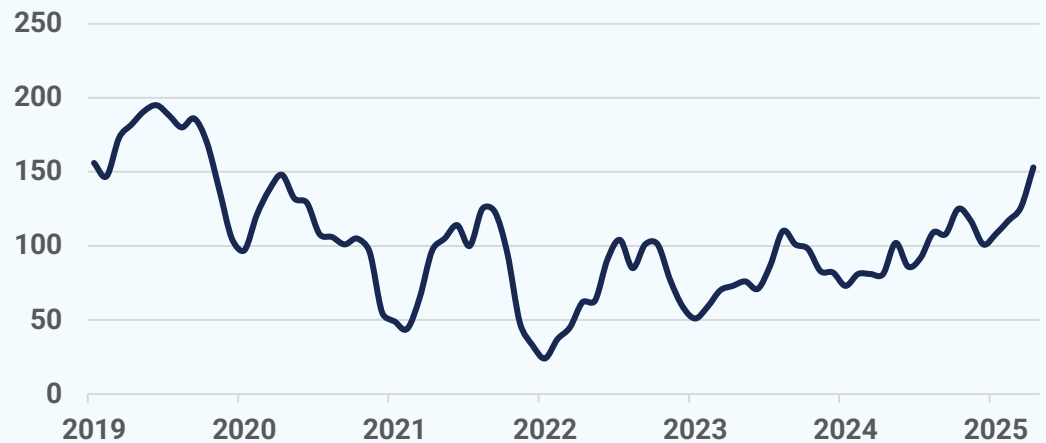
April 2025

+88.9%

Apr '25 vs. Apr '24
(Apr '24: 81)

+21.4%

Apr '25 vs. Mar '25
(Mar '25: 126)



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