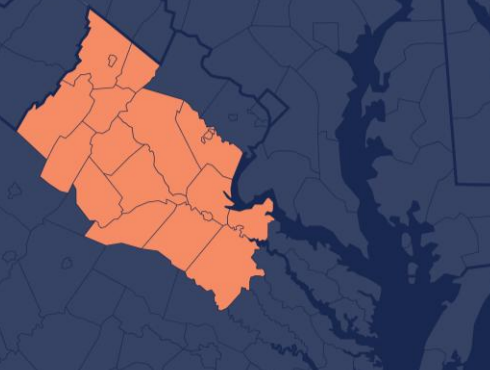


May 2026 Housing Market Report

Prepared by Bright Research



Data as of June 4, 2026

Key Market Statistics	May 2026	May 2025	Change	YTD 2026	YTD 2025	Change
Closed Sales	1,711	1,695	+0.9%	6,643	6,227	+6.7%
Median Sold Price	\$525,000	\$515,000	+1.9%	\$500,000	\$495,000	+1.0%
Median Days on Market	10 days	8 days	+2 days	15 days	11 days	+4 days
New Pending Sales	1,840	1,715	+7.3%	7,803	7,151	+9.1%
New Listings	2,021	1,927	+4.9%	10,426	9,534	+9.4%
Active Listings	3,599	3,020	+19.2%	3,599	3,020	+19.2%
Months of Supply	2.56	2.18	+0.38 mos.	2.56	2.18	+0.38 mos.
Showings	30,381	30,072	+1.0%	130,089	123,768	+5.1%

Housing Market Trends

Home prices hit a new record high in North Central Virginia. In May, the median sold price was \$525,000 a 1.9% increase over May 2025 and the highest median on record. Median prices were at record highs for single-family detached, townhome, and condos in the region, though price growth has been uneven across local markets in the region.

Compared to a year ago, buyer activity in North Central Virginia has been strong. Year-to-date closed sales are 6.7% higher than 2025. In May, there were 1,840 new pending sales, a 7.3% bump from last May.

More inventory is likely bringing out buyers. There were 2,021 new listings that came onto the market in May, which was a 4.9% increase over last year and the highest level of May new listings in four years.

While overall inventory rose by 19.2% year-over-year and is back at 2019 levels, single-family detached inventory remains far below pre-pandemic levels.

Market Outlook

The North Central Virginia market is one of the strongest markets in the Mid-Atlantic in 2026. Sales are still lower than long-term averages, but more inventory has brought out more buyers. The market will continue to be driven by higher-income buyers who are less interest rate sensitive.

Weekly Avg. Mortgage Rate 30-yr fixed rate



Source: Freddie Mac

Closed Sales

2026

2025

2024

2023

2022

1,711

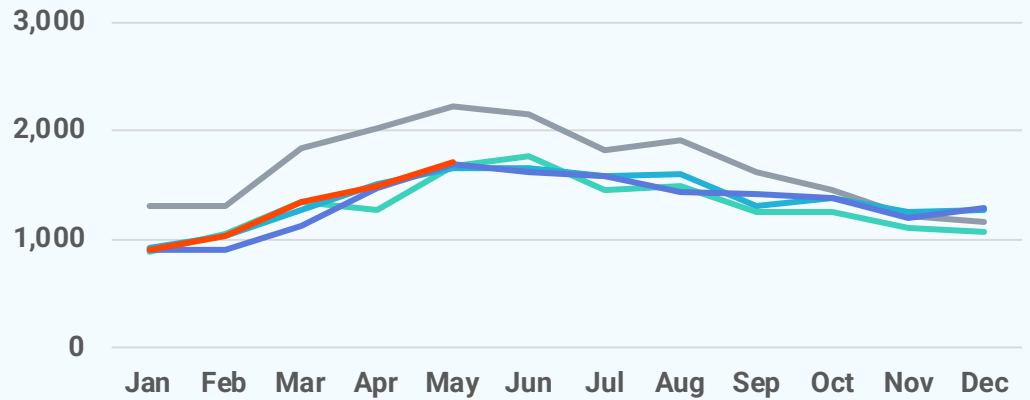
May 2026

+0.9%

May '26 vs. May '25
(May '25: 1,695)

+14.6%

May '26 vs. Apr '26
(Apr '26: 1,493)



Median Sold Price

2026

2025

2024

2023

2022

\$525,000

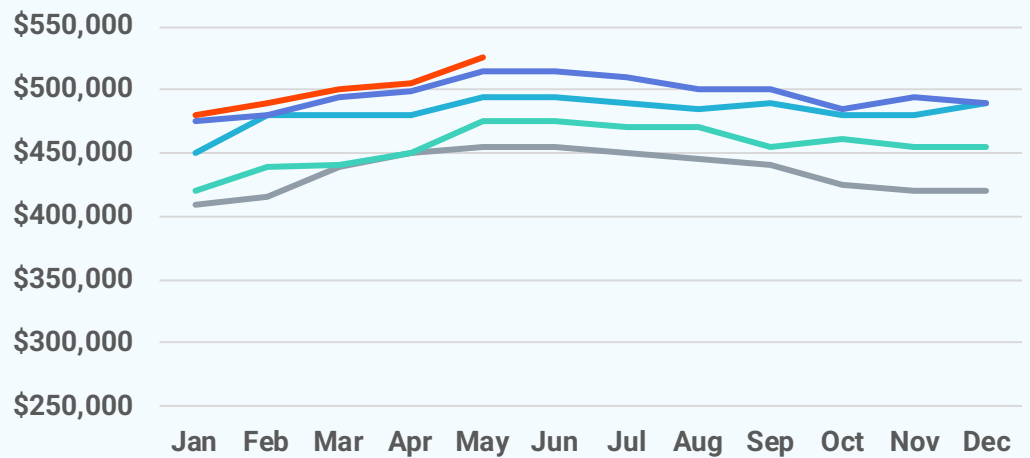
May 2026

+1.9%

May '26 vs. May '25
(May '25: \$515,000)

+4.0%

May '26 vs. Apr '26
(Apr '26: \$505,000)



Median Days on Market

2026

2025

2024

2023

2022

10 days

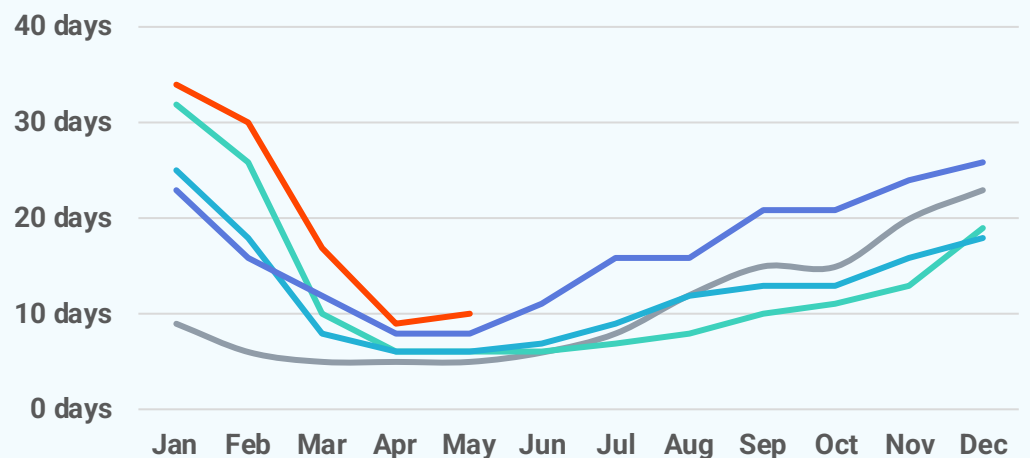
May 2026

+2 days

May '26 vs. May '25
(May '25: 8 days)

+1 day

May '26 vs. Apr '26
(Apr '26: 9 days)



New Pending Sales

2026

2025

2024

2023

2022

1,840

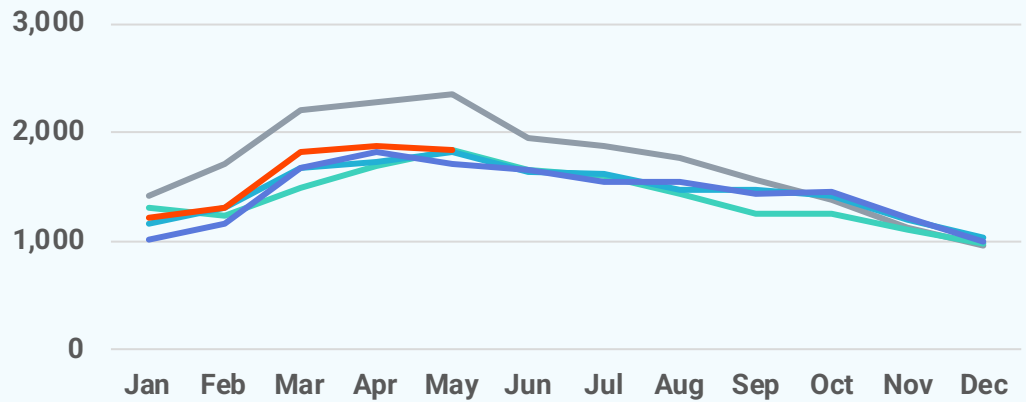
May 2026

+7.3%

May '26 vs. May '25
(May '25: 1,715)

-1.6%

May '26 vs. Apr '26
(Apr '26: 1,869)



New Listings

2026

2025

2024

2023

2022

2,021

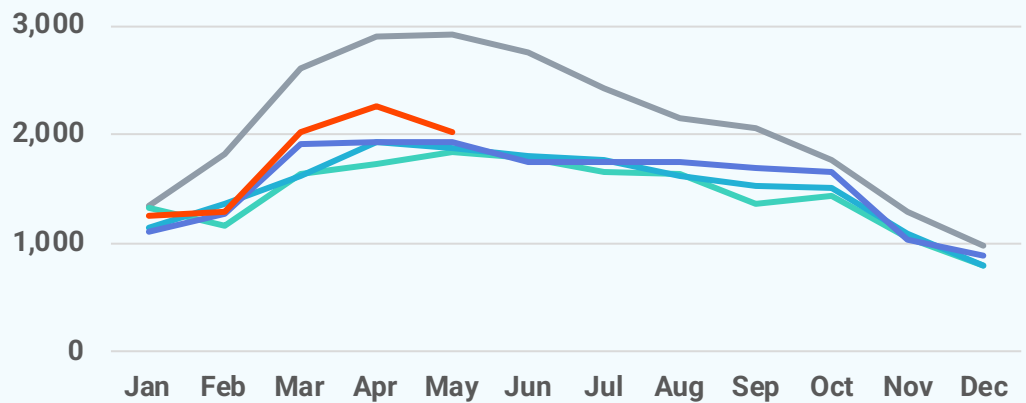
May 2026

+4.9%

May '26 vs. May '25
(May '25: 1,927)

-10.3%

May '26 vs. Apr '26
(Apr '26: 2,253)



Active Listings

2026

2025

2024

2023

2022

3,599

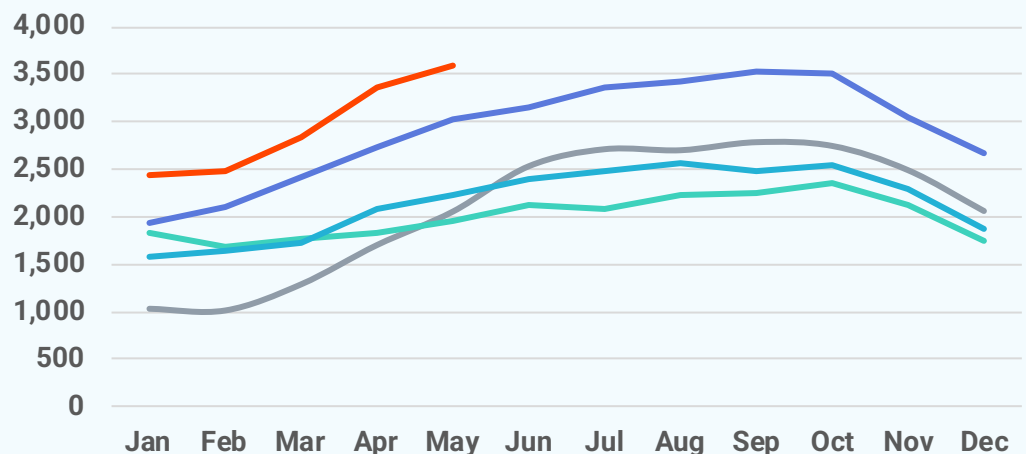
May 2026

+19.2%

May '26 vs. May '25
(May '25: 3,020)

+7.1%

May '26 vs. Apr '26
(Apr '26: 3,359)



Local Markets	Closed Sales		Median Sales Price		Median Days on Market	
	May '26	vs. May '25	May '26	vs. May '25	May '26	vs. May '25
North Central VA	1,711	+0.9%	\$525,000	+1.9%	10 days	+2 days
Caroline County, VA	28	-36.4%	\$444,450	+20.1%	13 days	-17 days
Clarke County, VA	21	+23.5%	\$550,000	-8.3%	7 days	-4 days
Culpeper County, VA	60	+5.3%	\$570,000	+16.3%	16 days	+9 days
Fauquier County, VA	103	+10.8%	\$680,000	+11.8%	7 days	-1 day
Frederick County, VA	154	-4.9%	\$423,270	-5.9%	13 days	-1 day
Fredericksburg City, VA	30	-6.3%	\$454,649	-13.4%	9 days	+0 days
King George County, VA	39	+18.2%	\$460,000	-4.2%	13 days	+6 days
Madison County, VA	11	-15.4%	\$495,000	+45.6%	6 days	-24 days
Manassas City, VA	46	+0.0%	\$453,500	-14.4%	9 days	+2 days
Manassas Park City, VA	17	-10.5%	\$504,000	+9.5%	29 days	+22 days
Orange County, VA	78	+1.3%	\$420,000	+0.0%	15 days	+1 day
Page County, VA	31	+34.8%	\$345,000	-1.4%	8 days	-9 days
Prince William County, VA	565	+8.2%	\$617,000	+2.8%	8 days	+2 days
Rappahannock County, VA	6	-14.3%	\$880,000	+44.3%	7 days	-13 days
Shenandoah County, VA	40	-23.1%	\$377,500	+8.0%	14 days	+3 days
Spotsylvania County, VA	164	-10.9%	\$474,447	+0.9%	10 days	-1 day
Stafford County, VA	219	-0.9%	\$550,000	-5.0%	8 days	+0 days
Warren County, VA	74	+29.8%	\$423,000	+4.4%	10 days	+4 days
Winchester City, VA	25	-30.6%	\$360,000	-3.4%	16 days	+6 days

Local Markets	New Pending Sales		New Listings		Showings	
	May '26	vs. May '25	May '26	vs. May '25	May '26	vs. May '25
North Central VA	1,840	+7.3%	2,021	+4.9%	30,381	+1.0%
Caroline County, VA	58	+26.1%	47	+38.2%	586	+32.0%
Clarke County, VA	17	-19.0%	17	-10.5%	272	-18.6%
Culpeper County, VA	64	+16.4%	82	+26.2%	844	+20.1%
Fauquier County, VA	122	+48.8%	111	+0.0%	1,763	+38.4%
Frederick County, VA	121	-22.4%	159	-7.0%	2,243	+7.0%
Fredericksburg City, VA	23	-25.8%	34	-22.7%	462	+10.0%
King George County, VA	32	+10.3%	40	-14.9%	464	+24.1%
Madison County, VA	17	-10.5%	18	-14.3%	187	+19.9%
Manassas City, VA	48	+14.3%	52	+15.6%	938	+11.8%
Manassas Park City, VA	10	-50.0%	12	-57.1%	280	-1.1%
Orange County, VA	85	+23.2%	126	+23.5%	760	-6.5%
Page County, VA	27	+58.8%	29	-19.4%	279	+12.0%
Prince William County, VA	602	+11.1%	594	+16.0%	11,465	-5.4%
Rappahannock County, VA	13	+85.7%	10	-16.7%	170	+53.2%
Shenandoah County, VA	67	-5.6%	71	-11.3%	654	-7.9%
Spotsylvania County, VA	197	+10.1%	241	-2.4%	3,333	+8.3%
Stafford County, VA	241	+5.2%	261	+3.2%	3,960	-4.0%
Warren County, VA	61	-7.6%	79	+31.7%	1,087	-15.9%
Winchester City, VA	35	+2.9%	38	-5.0%	634	-2.6%

Local Markets

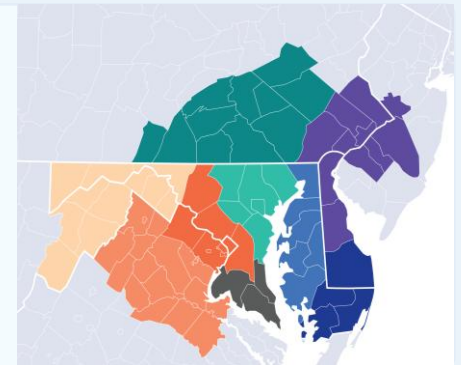
Active Listings

Months of Supply

	May '26	vs. May '25	May '26	vs. May '25
North Central VA	3,599	+19.2%	2.56	+0.38 months
Caroline County, VA	115	+33.7%	3.48	+1.27 months
Clarke County, VA	50	+47.1%	3.13	+0.51 months
Culpeper County, VA	198	+32.9%	3.74	+0.93 months
Fauquier County, VA	218	+7.9%	2.69	+0.03 months
Frederick County, VA	372	+27.4%	2.91	+0.66 months
Fredericksburg City, VA	65	+30.0%	2.95	+0.78 months
King George County, VA	80	+31.1%	3.20	+1.02 months
Madison County, VA	30	-36.2%	2.73	-1.97 months
Manassas City, VA	70	+9.4%	1.84	+0.11 months
Manassas Park City, VA	28	+12.0%	1.75	+0.08 months
Orange County, VA	240	+34.8%	3.64	+0.57 months
Page County, VA	84	+0.0%	3.65	-0.55 months
Prince William County, VA	793	+20.2%	1.84	+0.31 months
Rappahannock County, VA	48	+50.0%	8.00	+2.67 months
Shenandoah County, VA	148	+24.4%	2.96	+0.53 months
Spotsylvania County, VA	388	+0.3%	2.47	-0.06 months
Stafford County, VA	438	+15.0%	2.69	+0.26 months
Warren County, VA	157	+37.7%	3.14	+0.76 months
Winchester City, VA	77	+40.0%	2.85	+1.02 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

Bright MLS powers some of the nation's most dynamic real estate markets as the largest MLS in the U.S. Serving over 100,000 professionals across Delaware, Maryland, New Jersey, Pennsylvania, Virginia, West Virginia, and D.C., Bright provides real-time data, deep market intelligence, and tools supporting more than half a million buyers and sellers each month. In 2025, Bright enabled over 460,000 listings. Built to lead, Bright delivers trusted housing insights and industry-leading tools that drive a more transparent, competitive marketplace. Learn more at BrightMLS.com.

Please contact **Christy Reap**,
Media Relations Director with
interview or information requests:

- (202) 309-9362
- christy.reap@brightmls.com

May 2026 Detached Single-Family Home Report

Prepared by Bright Research

Data as of June 4, 2026

Key Market Statistics	May 2026	May 2025	Change
Closed Sales	1,265	1,285	-1.6%
Median Sold Price	\$565,000	\$555,000	+1.8%
Median Days on Market	9 days	9 days	+0 days
New Pending Sales	1,362	1,294	+5.3%
New Listings	1,487	1,493	-0.4%
Active Listings	2,834	2,490	+13.8%
Months of Supply	2.73	2.42	+0.31 mos.

Closed Sales

2026

2025

2024

2023

2022

1,265

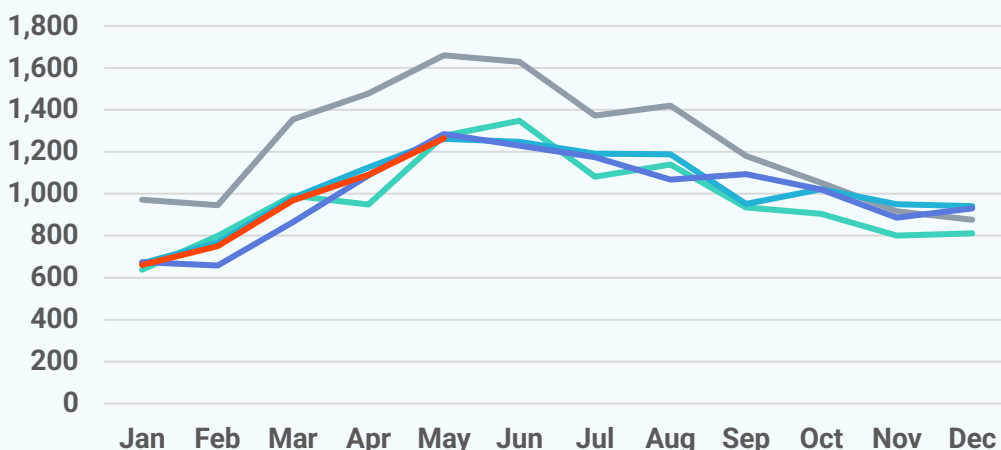
May 2026

-1.6%

May '26 vs. May '25
(May '25: 1,285)

+15.9%

May '26 vs. Apr '26
(Apr '26: 1,091)



Median Sold Price

2026 2025 2024 2023 2022

\$565,000

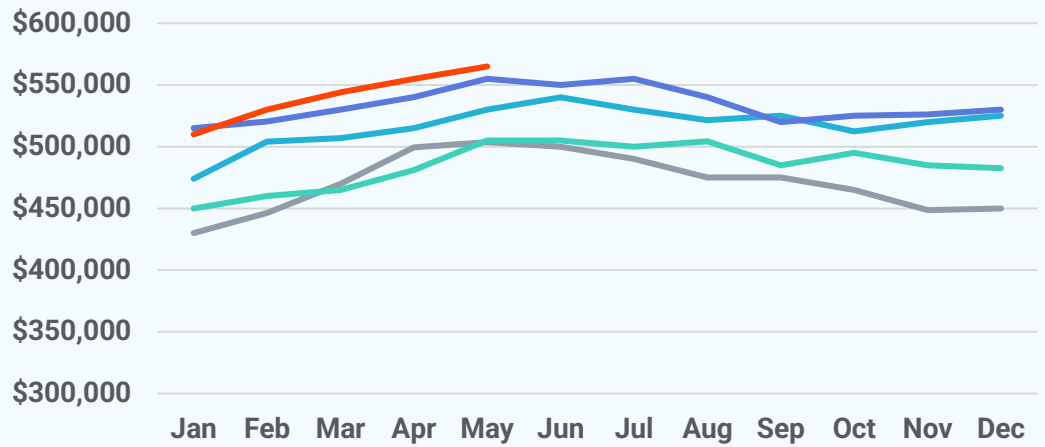
May 2026

+1.8%

May '26 vs. May '25
(May '25: \$555,000)

+1.8%

May '26 vs. Apr '26
(Apr '26: \$555,000)



Median Days on Market

2026 2025 2024 2023 2022

9 days

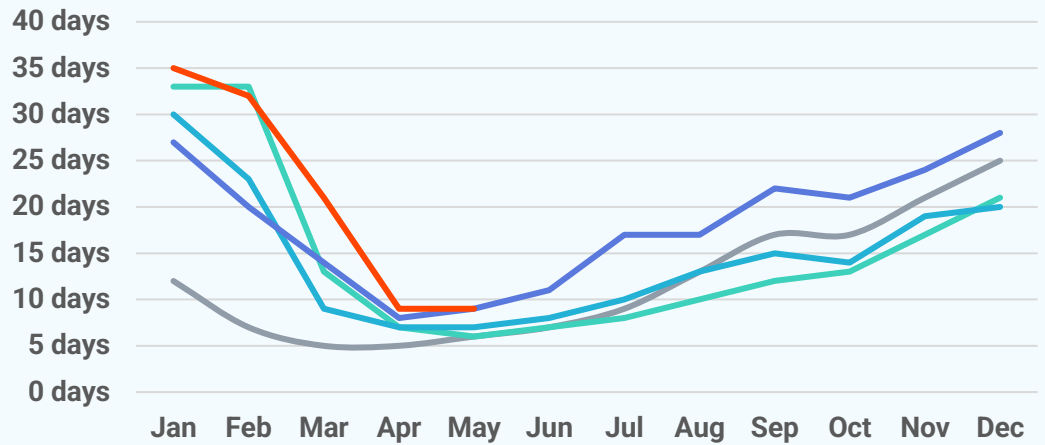
May 2026

+0 days

May '26 vs. May '25
(May '25: 9 days)

+0 days

May '26 vs. Apr '26
(Apr '26: 9 days)



New Pending Sales

2026 2025 2024 2023 2022

1,362

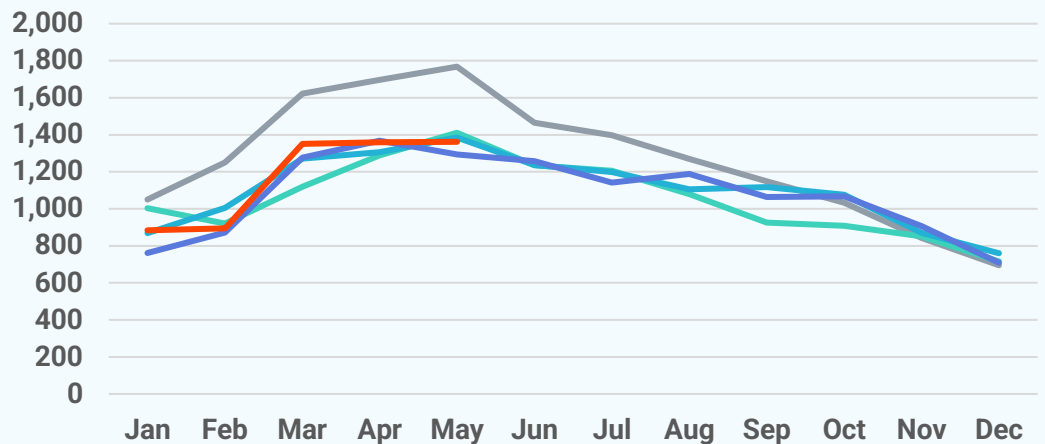
May 2026

+5.3%

May '26 vs. May '25
(May '25: 1,294)

+0.1%

May '26 vs. Apr '26
(Apr '26: 1,360)



New Listings

2026

2025

2024

2023

2022

1,487

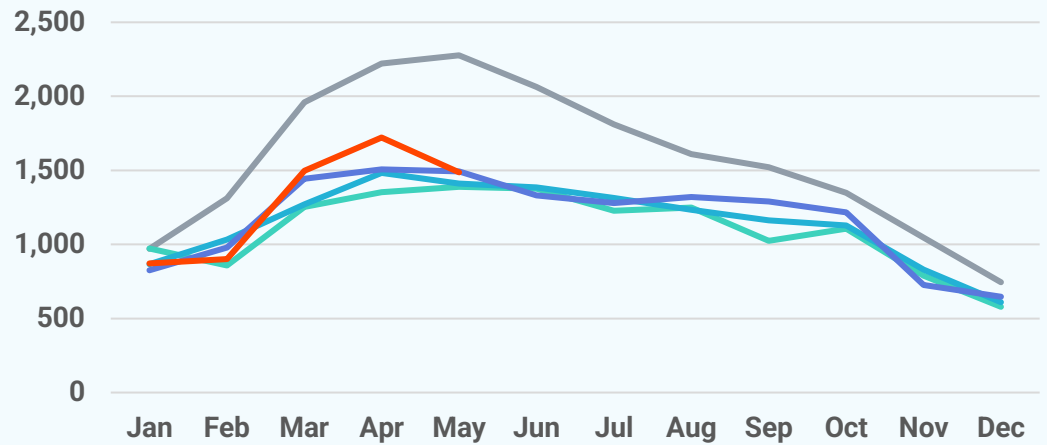
May 2026

-0.4%

May '26 vs. May '25
(May '25: 1,493)

-13.6%

May '26 vs. Apr '26
(Apr '26: 1,722)



Active Listings

2026

2025

2024

2023

2022

2,834

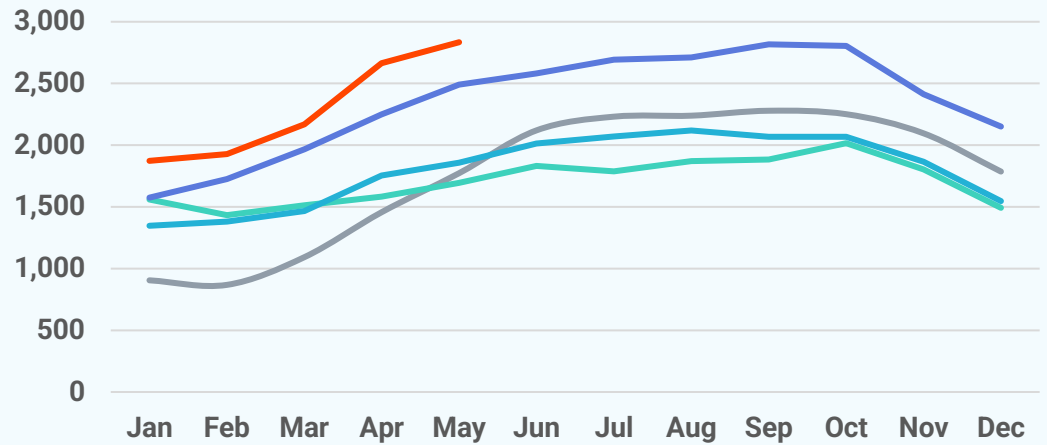
May 2026

+13.8%

May '26 vs. May '25
(May '25: 2,490)

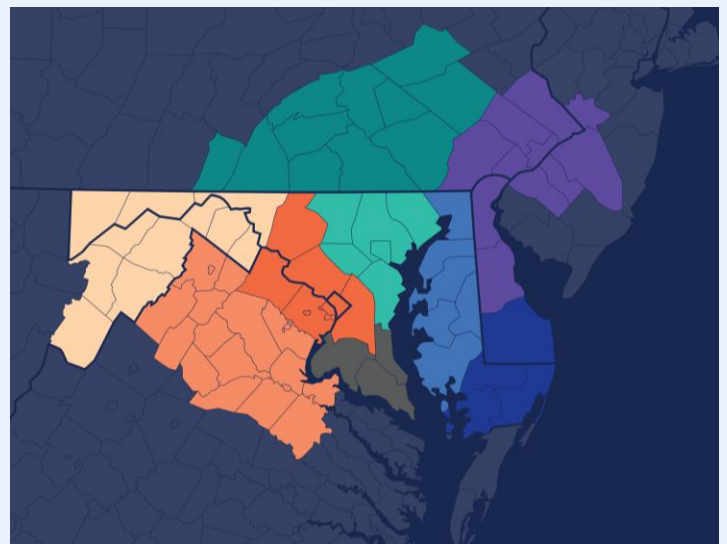
+6.4%

May '26 vs. Apr '26
(Apr '26: 2,663)



About Bright MLS

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May 2026 Attached/Townhomes Report

Prepared by Bright Research

Data as of June 4, 2026

Key Market Statistics	May 2026	May 2025	Change
Closed Sales	331	310	+6.8%
Median Sold Price	\$450,000	\$440,500	+2.2%
Median Days on Market	9 days	7 days	+2 days
New Pending Sales	360	325	+10.8%
New Listings	399	327	+22.0%
Active Listings	506	357	+41.7%
Months of Supply	1.83	1.34	+0.49 mos.

Closed Sales

2026

2025

2024

2023

2022

331

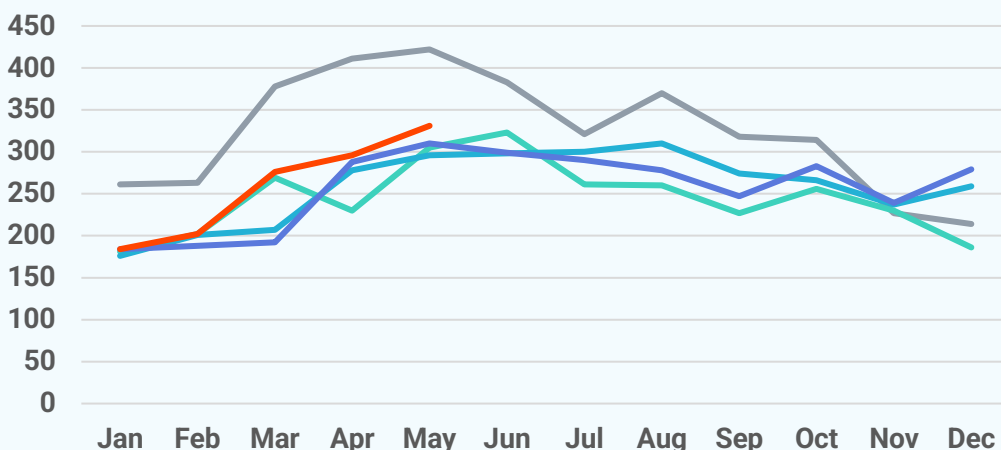
May 2026

+6.8%

May '26 vs. May '25
(May '25: 310)

+11.8%

May '26 vs. Apr '26
(Apr '26: 296)



Median Sold Price

2026 2025 2024 2023 2022

\$450,000

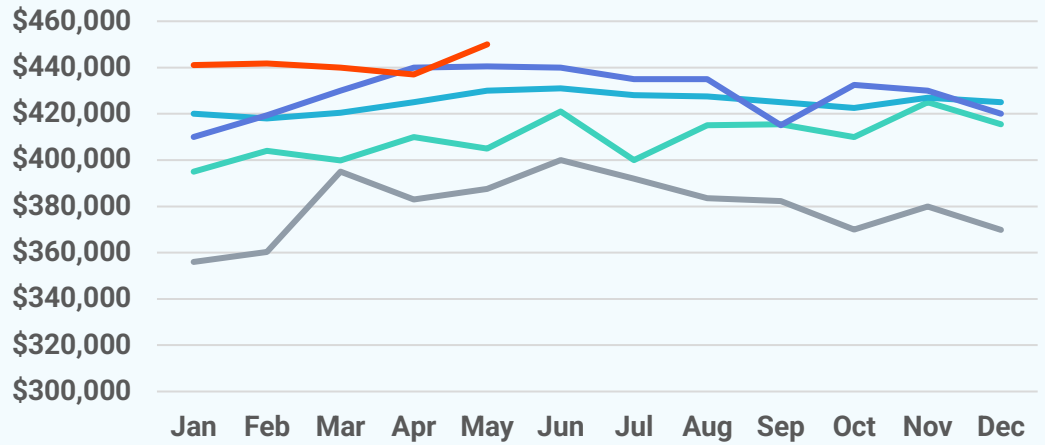
May 2026

+2.2%

May '26 vs. May '25
(May '25: \$440,500)

+3.0%

May '26 vs. Apr '26
(Apr '26: \$437,000)



Median Days on Market

2026 2025 2024 2023 2022

9 days

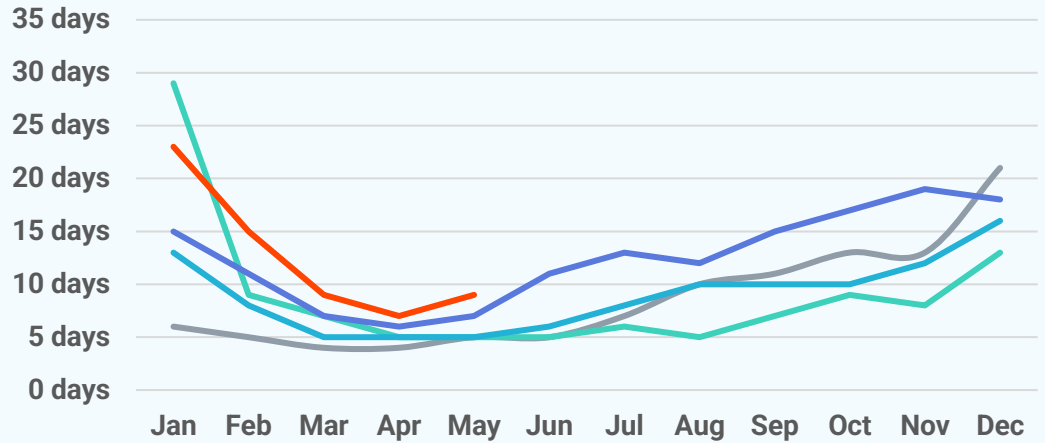
May 2026

+2 days

May '26 vs. May '25
(May '25: 7 days)

+2 days

May '26 vs. Apr '26
(Apr '26: 7 days)



New Pending Sales

2026 2025 2024 2023 2022

360

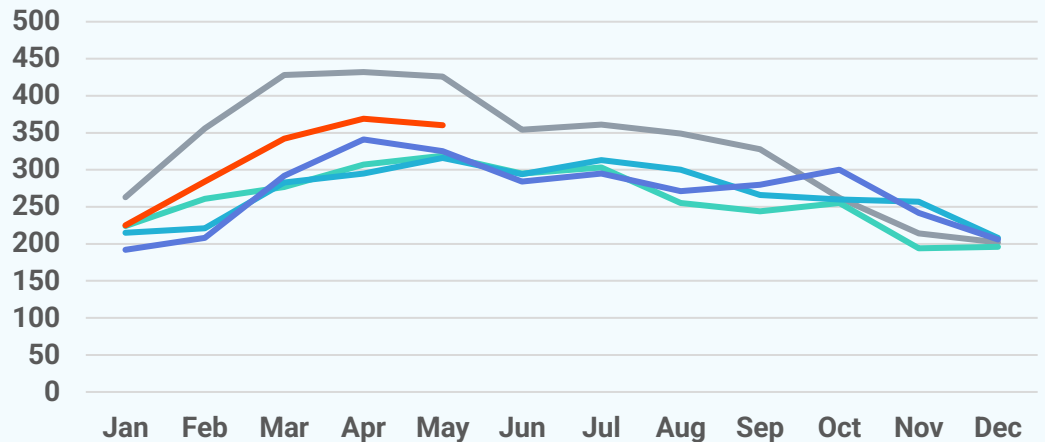
May 2026

+10.8%

May '26 vs. May '25
(May '25: 325)

-2.4%

May '26 vs. Apr '26
(Apr '26: 369)



New Listings

2026

2025

2024

2023

2022

399

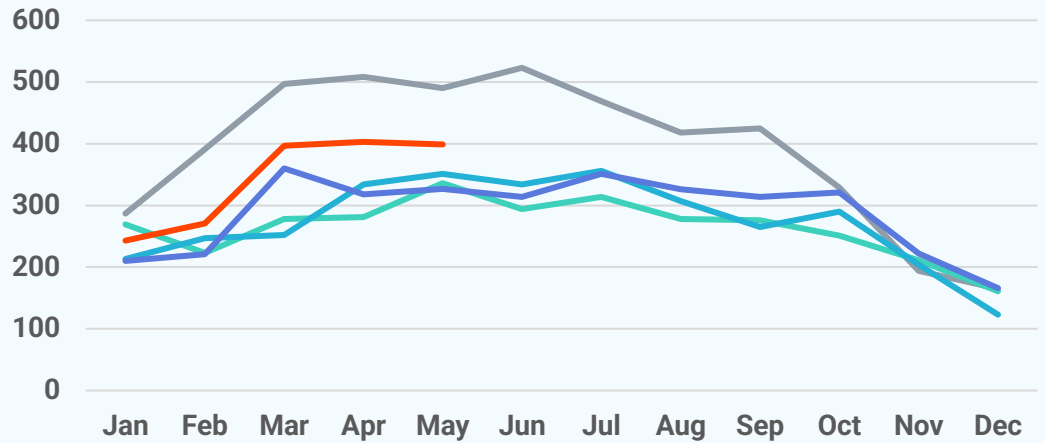
May 2026

+22.0%

May '26 vs. May '25
(May '25: 327)

-1.0%

May '26 vs. Apr '26
(Apr '26: 403)



Active Listings

2026

2025

2024

2023

2022

506

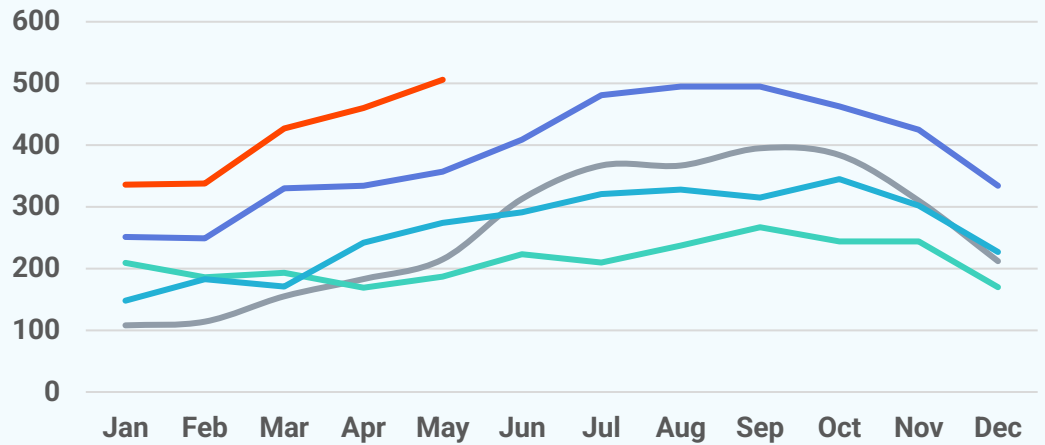
May 2026

+41.7%

May '26 vs. May '25
(May '25: 357)

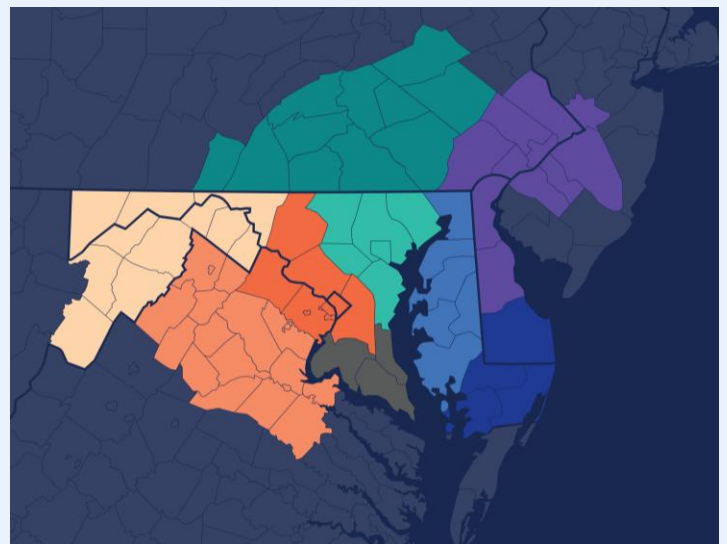
+10.0%

May '26 vs. Apr '26
(Apr '26: 460)



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May 2026 Condos Report

Prepared by Bright Research

Data as of June 4, 2026

Key Market Statistics	May 2026	May 2025	Change
Closed Sales	114	100	+14.0%
Median Sold Price	\$425,000	\$420,000	+1.2%
Median Days on Market	29 days	9 days	+20 days
New Pending Sales	117	96	+21.9%
New Listings	135	107	+26.2%
Active Listings	259	173	+49.7%
Months of Supply	2.82	2.01	+0.81 mos.

Closed Sales

2026

2025

2024

2023

2022

114

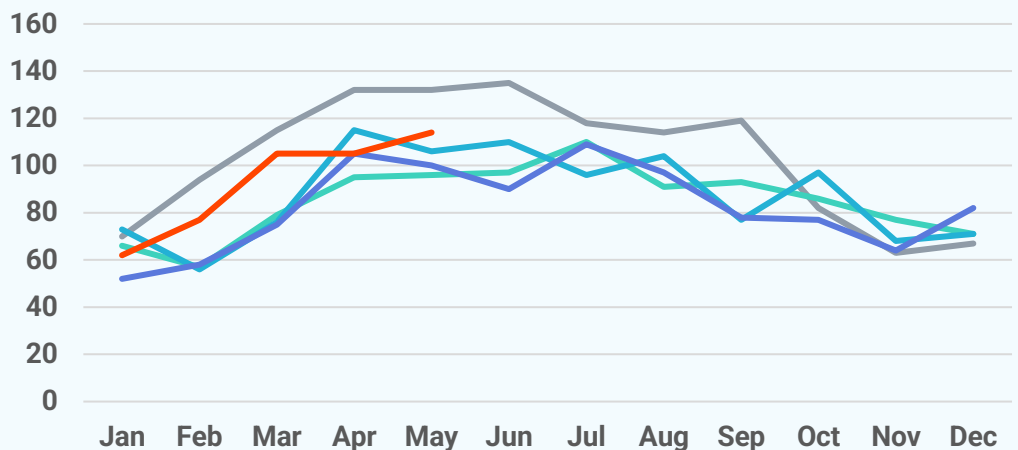
May 2026

+14.0%

May '26 vs. May '25
(May '25: 100)

+8.6%

May '26 vs. Apr '26
(Apr '26: 105)



Median Sold Price

2026 2025 2024 2023 2022

\$425,000

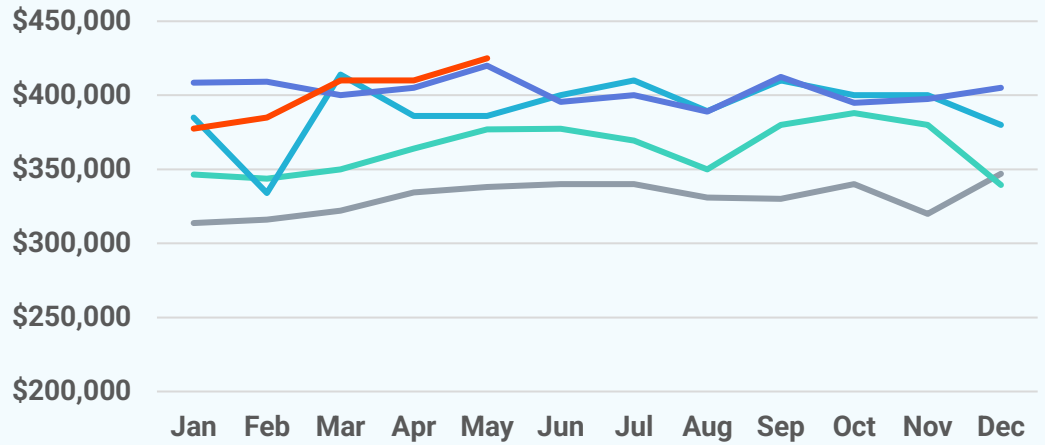
May 2026

+1.2%

May '26 vs. May '25
(May '25: \$420,000)

+3.7%

May '26 vs. Apr '26
(Apr '26: \$410,000)



Median Days on Market

2026 2025 2024 2023 2022

29 days

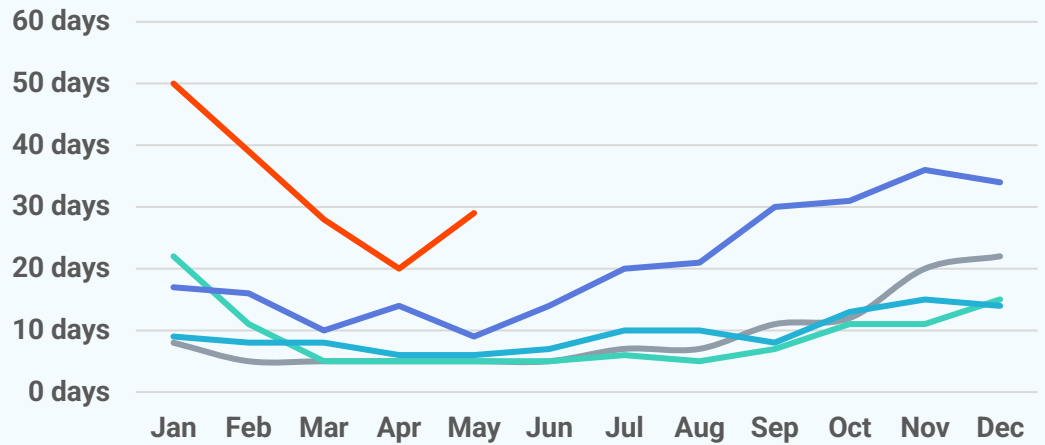
May 2026

+20 days

May '26 vs. May '25
(May '25: 9 days)

+9 days

May '26 vs. Apr '26
(Apr '26: 20 days)



New Pending Sales

2026 2025 2024 2023 2022

117

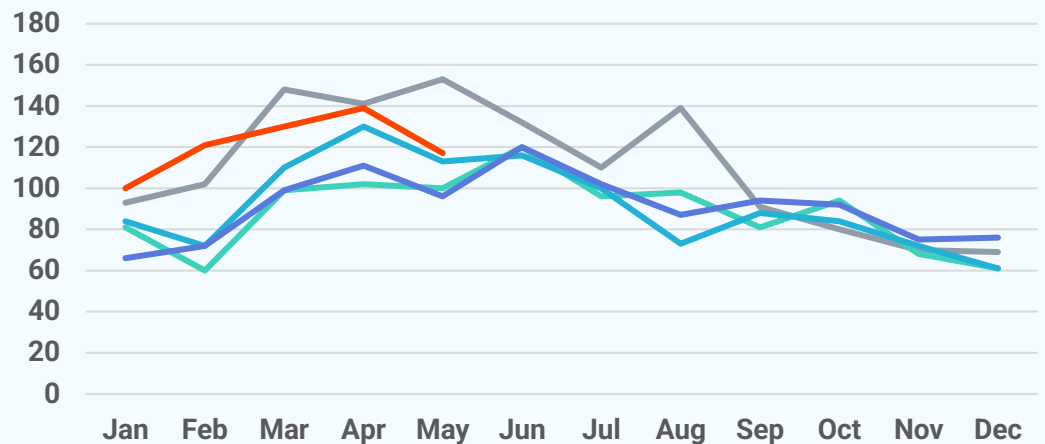
May 2026

+21.9%

May '26 vs. May '25
(May '25: 96)

-15.8%

May '26 vs. Apr '26
(Apr '26: 139)



New Listings

2026

2025

2024

2023

2022

135

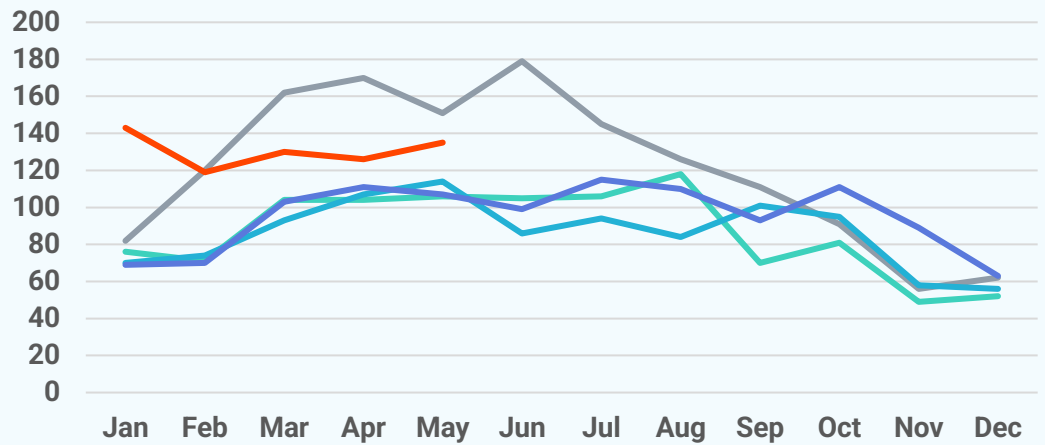
May 2026

+26.2%

May '26 vs. May '25
(May '25: 107)

+7.1%

May '26 vs. Apr '26
(Apr '26: 126)



Active Listings

2026

2025

2024

2023

2022

259

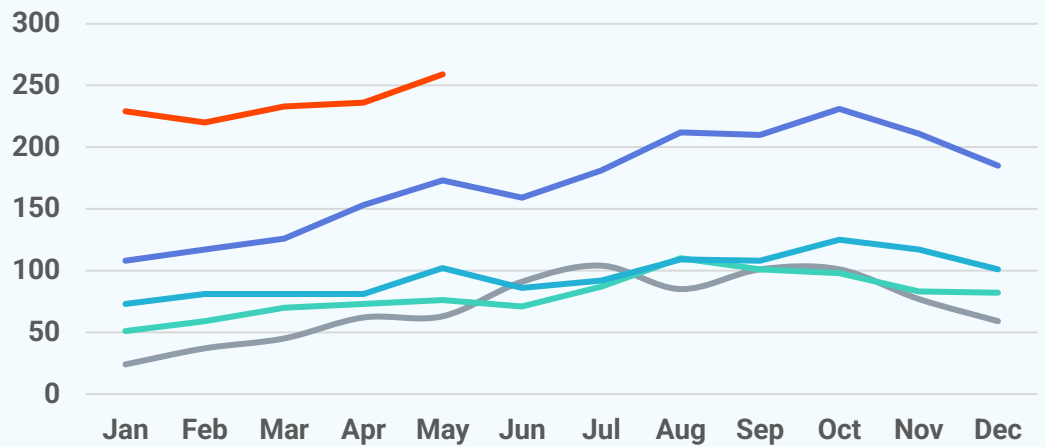
May 2026

+49.7%

May '26 vs. May '25
(May '25: 173)

+9.7%

May '26 vs. Apr '26
(Apr '26: 236)



About Bright MLS

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