

August 2025 Housing Market Report

Prepared by Bright Research

Data as of September 5, 2025

Key Market Statistics	Aug 2025	Aug 2024	Change	YTD 2025	YTD 2024	Change
Closed Sales	405	474	-14.6%	3,243	3,401	-4.6%
Median Sold Price	\$441,000	\$437,000	+0.9%	\$449,950	\$433,490	+3.8%
Median Days on Market	19 days	12 days	+7 days	16 days	13 days	+3 days
New Pending Sales	468	457	+2.4%	3,500	3,622	-3.4%
New Listings	478	455	+5.1%	4,862	4,439	+9.5%
Active Listings	1,049	737	+42.3%	1,049	737	+42.3%
Months of Supply	2.62	1.76	+0.86 mos.	2.62	1.76	+0.86 mos.
Showings	7,616	7,033	+8.3%	60,354	61,386	-1.7%

Housing Market Trends

Slight uptick in buyer traffic but overall market conditions remain slow in Southern Maryland. New pending sales and new listings increased 2.4% and 5.1% year-over-year, respectively, in Southern Maryland in August 2025. Despite the improvement in pending sales this month, the number of pending contracts is lower year-to-date in all counties.

New listings gains, however, have not been uncommon in 2025. Though new listings remain near historic lows, both Calvert and Charles counties have had more new listings in 2025 than in 2024 year-to-date.

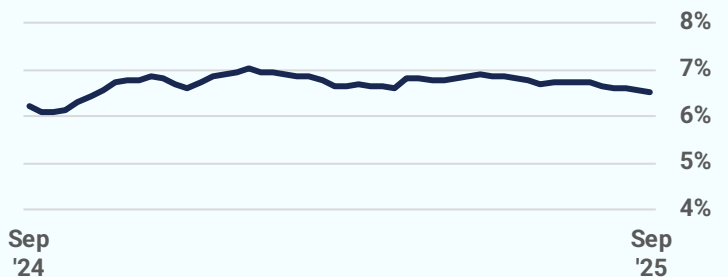
The difference between what's coming on versus what's going off means there have been significant gains in active listings. The number of homes on the market at the end of August was 42.3% higher than last year.

More inventory has led to slower price growth. In August, the median sold price was \$441,000, which was a modest 0.9% increase over a year ago. The typical home took seven days longer to sell than it did a year ago.

Market Outlook

Overall transactions in Southern Maryland are going to be lower in 2025 than they were in 2024. The growth in inventory has led to slower price growth and longer days on market. Affordability challenges and economic uncertainty will continue to subdue market activity in the region through the end of the year.

Weekly Avg. Mortgage Rate 30-yr fixed rate



Source: Freddie Mac

Closed Sales

2025

2024

2020-2023 Range

405

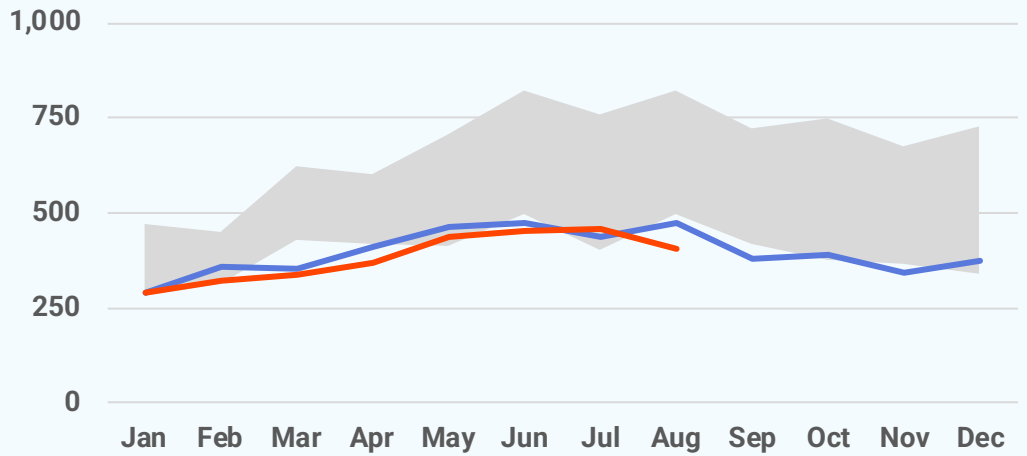
August 2025

-14.6%

Aug '25 vs. Aug '24
(Aug '24: 474)

-11.4%

Aug '25 vs. Jul '25
(Jul '25: 457)



Median Sold Price

2025

2024

2023

2022

2021

2020

\$441,000

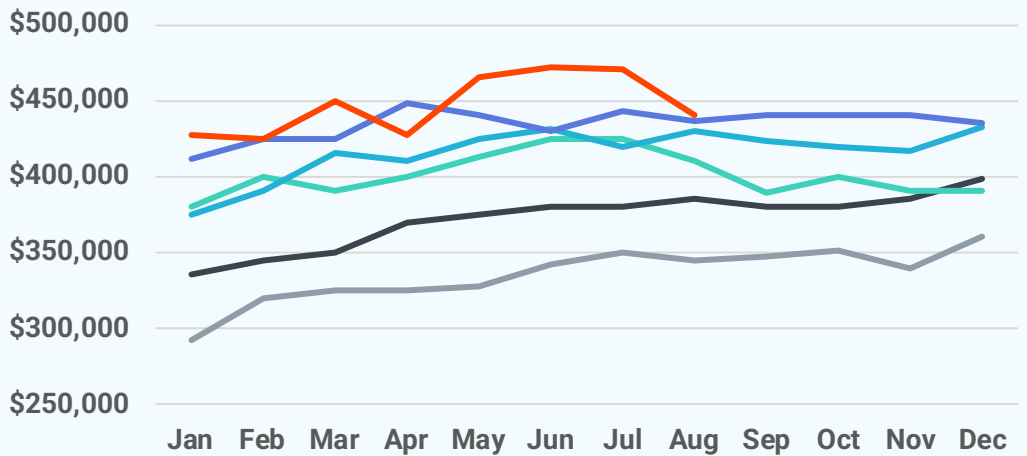
August 2025

+0.9%

Aug '25 vs. Aug '24
(Aug '24: \$437,000)

-6.2%

Aug '25 vs. Jul '25
(Jul '25: \$470,000)



Median Days on Market

19 days

August 2025

+7 days

Aug '25 vs. Aug '24
(Aug '24: 12 days)

+4 days

Aug '25 vs. Jul '25
(Jul '25: 15 days)



New Pending Sales

2025

2024

2020-2023 Range

468

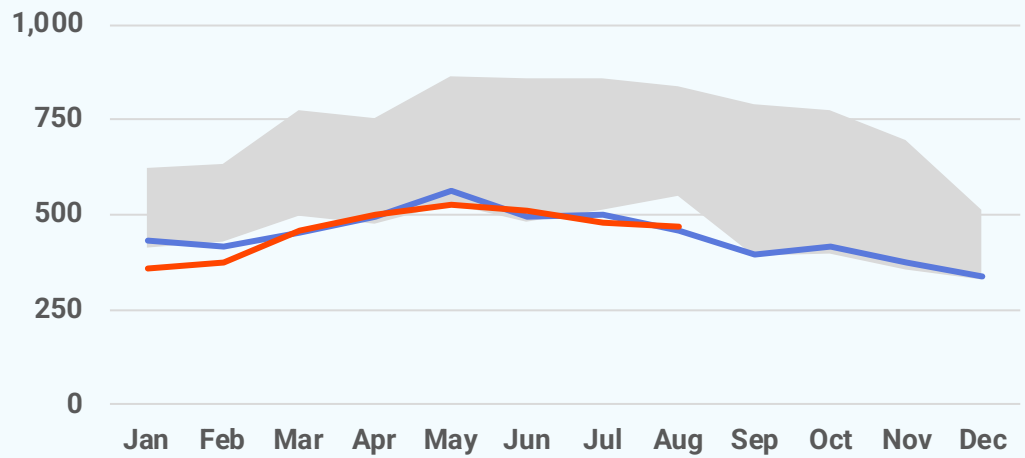
August 2025

+2.4%

Aug '25 vs. Aug '24
(Aug '24: 457)

-2.3%

Aug '25 vs. Jul '25
(Jul '25: 479)



New Listings

2025

2024

2020-2023 Range

478

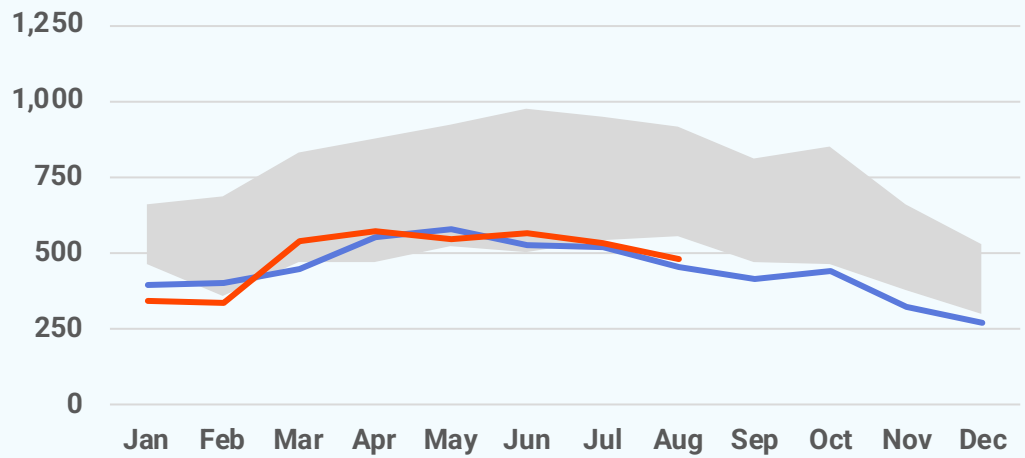
August 2025

+5.1%

Aug '25 vs. Aug '24
(Aug '24: 455)

-10.0%

Aug '25 vs. Jul '25
(Jul '25: 531)



Active Listings

1,049

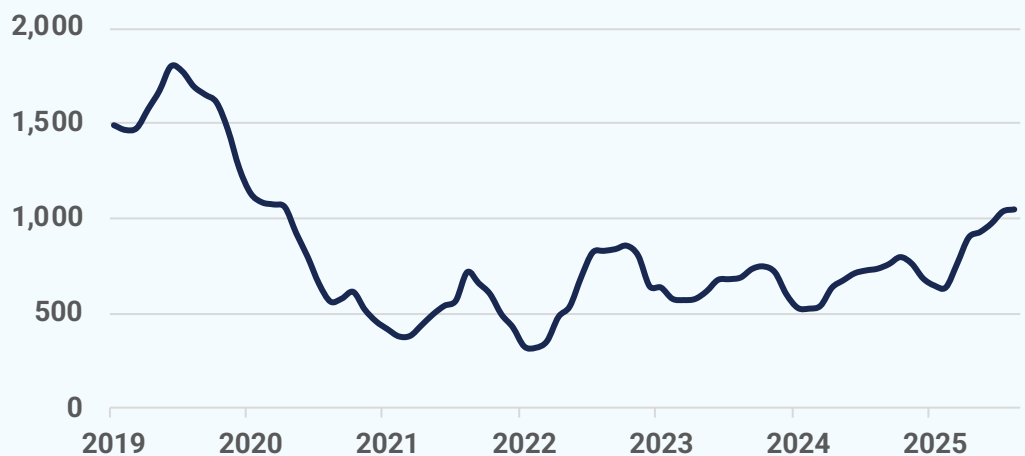
August 2025

+42.3%

Aug '25 vs. Aug '24
(Aug '24: 737)

+1.1%

Aug '25 vs. Jul '25
(Jul '25: 1,038)



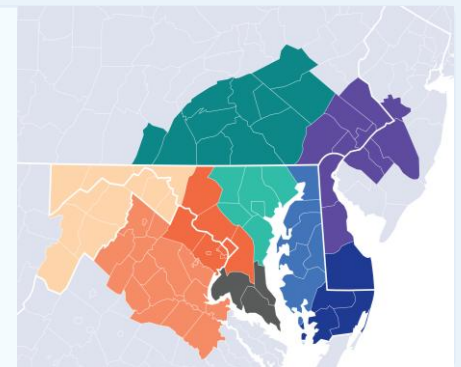
Local Markets	Closed Sales		Median Sales Price		Median Days on Market	
	Aug '25	vs. Aug '24	Aug '25	vs. Aug '24	Aug '25	vs. Aug '24
Southern MD	405	-14.6%	\$441,000	+0.9%	19 days	+7 days
Calvert County, MD	108	-19.4%	\$499,900	+11.1%	8 days	-2 days
Charles County, MD	190	-12.0%	\$450,000	+0.0%	28 days	+14 days
Saint Mary's County, MD	107	-13.7%	\$415,000	+3.1%	16 days	+4 days

Local Markets	New Pending Sales		New Listings		Showings	
	Aug '25	vs. Aug '24	Aug '25	vs. Aug '24	Aug '25	vs. Aug '24
Southern MD	468	+2.4%	478	+5.1%	7,616	+8.3%
Calvert County, MD	99	-13.9%	123	-3.9%	1,858	+0.0%
Charles County, MD	223	+0.9%	255	+24.4%	3,892	+13.1%
Saint Mary's County, MD	146	+20.7%	100	-18.0%	1,866	+7.6%

Local Markets	Active Listings		Months of Supply	
	Aug '25	vs. Aug '24	Aug '25	vs. Aug '24
Southern MD	1,049	+42.3%	2.62	+0.86 months
Calvert County, MD	204	+7.4%	2.13	+0.17 months
Charles County, MD	612	+78.4%	3.11	+1.44 months
Saint Mary's County, MD	233	+14.2%	2.20	+0.39 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 was founded in 2016 as a collaboration between 43 visionary associations and two of the nation's most prominent MLSs to transform what an MLS is and what it does, so real estate pros and the people they serve can thrive today and into our data-driven future through an open, clear and competitive housing market for all. Bright is proud to be the source of truth for comprehensive real estate data in the Mid-Atlantic, with market intelligence currently covering six states (Delaware, Maryland, New Jersey, Pennsylvania, Virginia, West Virginia) and the District of Columbia.

Please contact **Christy Reap**,
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- christy.reap@brightmls.com

August 2025 Detached Single-Family Home Report

Prepared by Bright Research

Data as of September 5, 2025

Key Market Statistics	Aug 2025	Aug 2024	Change
Closed Sales	332	358	-7.3%
Median Sold Price	\$465,000	\$492,000	-5.5%
Median Days on Market	17 days	12 days	+5 days
New Pending Sales	377	353	+6.8%
New Listings	372	347	+7.2%
Active Listings	827	623	+32.7%
Months of Supply	2.68	1.90	+0.78 mos.

Closed Sales

2025

2024

2020-2023 Range

332

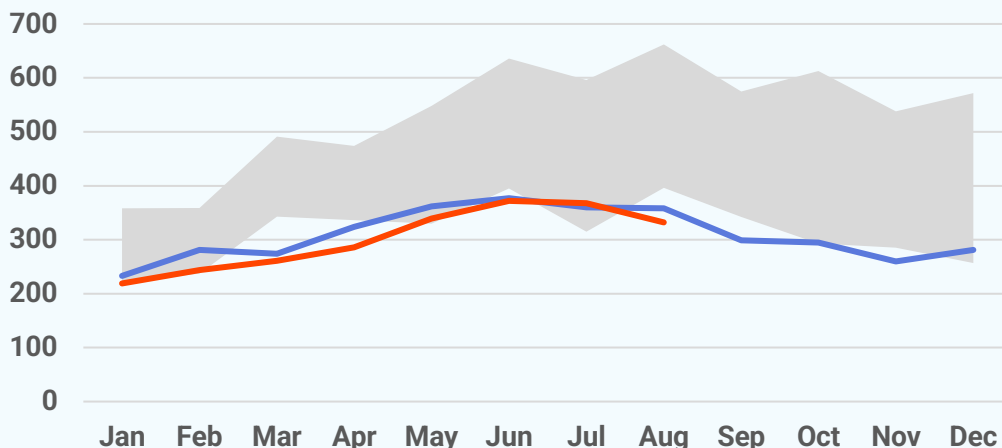
August 2025

-7.3%

Aug '25 vs. Aug '24
(Aug '24: 358)

-9.8%

Aug '25 vs. Jul '25
(Jul '25: 368)



Median Sold Price

2025 2024 2023 2022 2021 2020

\$465,000

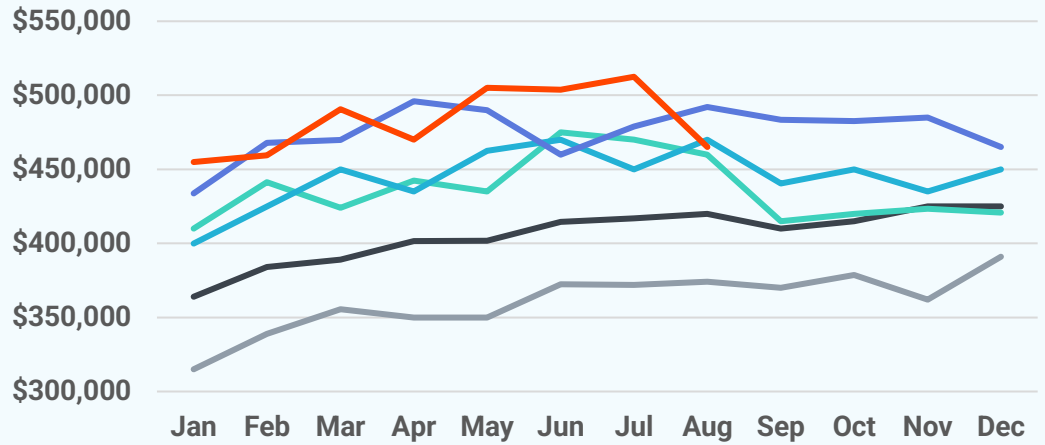
August 2025

-5.5%

Aug '25 vs. Aug '24
(Aug '24: \$492,000)

-9.3%

Aug '25 vs. Jul '25
(Jul '25: \$512,500)



Median Days on Market

17 days

August 2025

+5 days

Aug '25 vs. Aug '24
(Aug '24: 12 days)

+2 days

Aug '25 vs. Jul '25
(Jul '25: 15 days)



New Pending Sales

2025 2024 2020-2023 Range

377

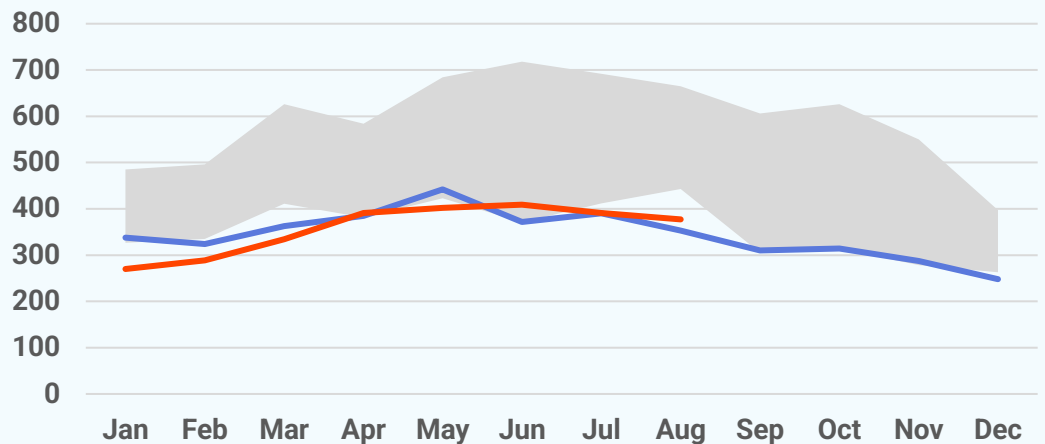
August 2025

+6.8%

Aug '25 vs. Aug '24
(Aug '24: 353)

-3.6%

Aug '25 vs. Jul '25
(Jul '25: 391)



New Listings

2025

2024

2020-2023 Range

372

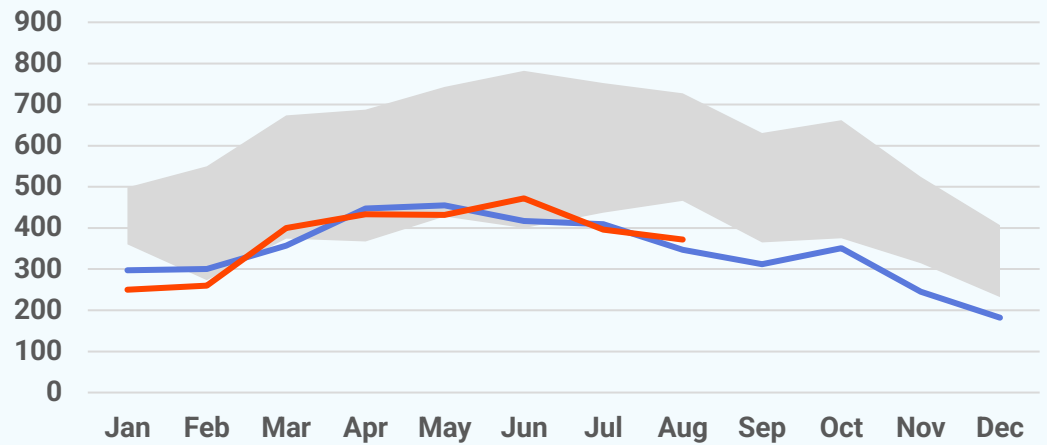
August 2025

+7.2%

Aug '25 vs. Aug '24
(Aug '24: 347)

-6.1%

Aug '25 vs. Jul '25
(Jul '25: 396)



Active Listings

827

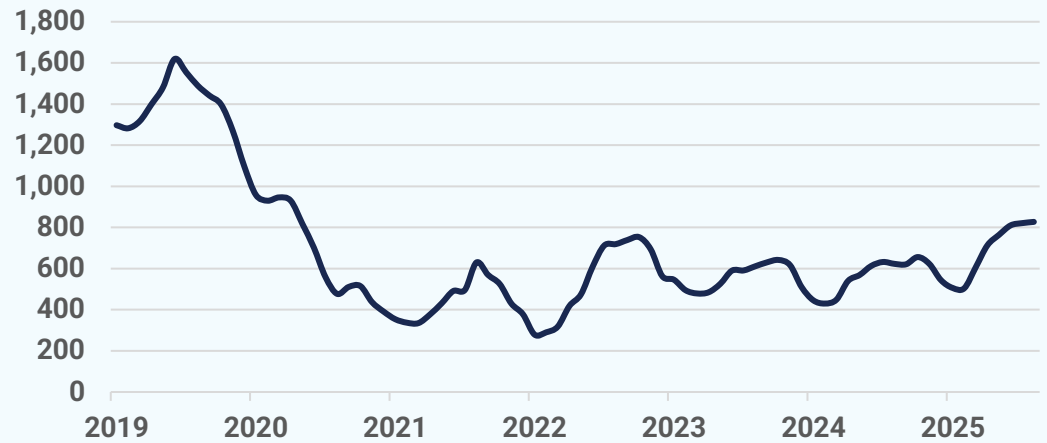
August 2025

+32.7%

Aug '25 vs. Aug '24
(Aug '24: 623)

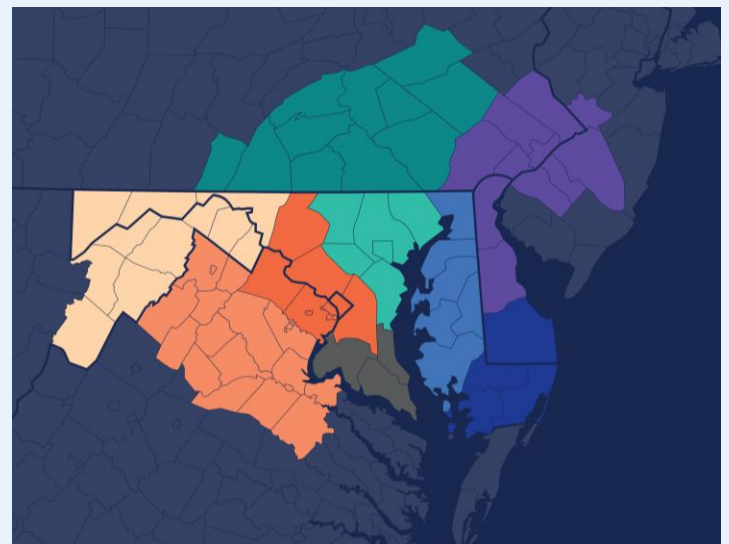
+0.7%

Aug '25 vs. Jul '25
(Jul '25: 821)



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August 2025 Attached/Townhomes Report

Prepared by Bright Research

Data as of September 5, 2025

Key Market Statistics	Aug 2025	Aug 2024	Change
Closed Sales	66	99	-33.3%
Median Sold Price	\$392,500	\$381,390	+2.9%
Median Days on Market	27 days	13 days	+14 days
New Pending Sales	79	93	-15.1%
New Listings	93	93	+0.0%
Active Listings	198	94	+110.6%
Months of Supply	2.41	1.22	+1.19 mos.

Closed Sales

2025

2024

2020-2023 Range

66

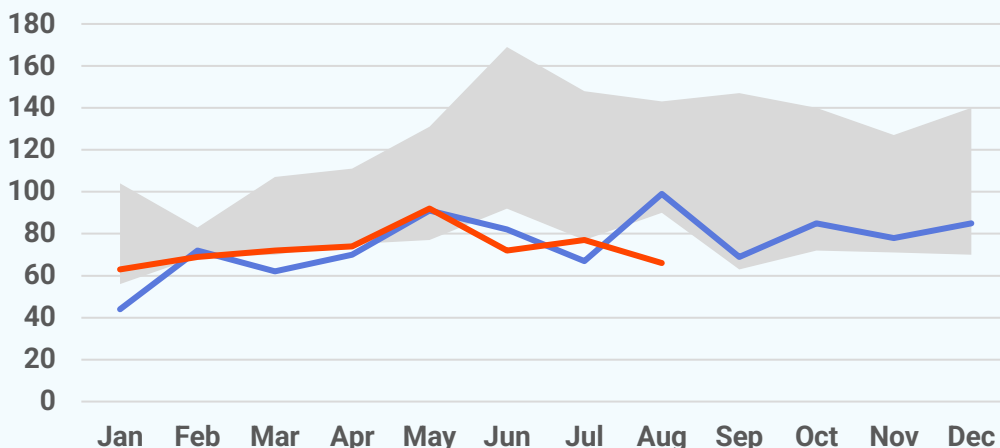
August 2025

-33.3%

Aug '25 vs. Aug '24
(Aug '24: 99)

-14.3%

Aug '25 vs. Jul '25
(Jul '25: 77)



Median Sold Price

2025 2024 2023 2022 2021 2020

\$392,500

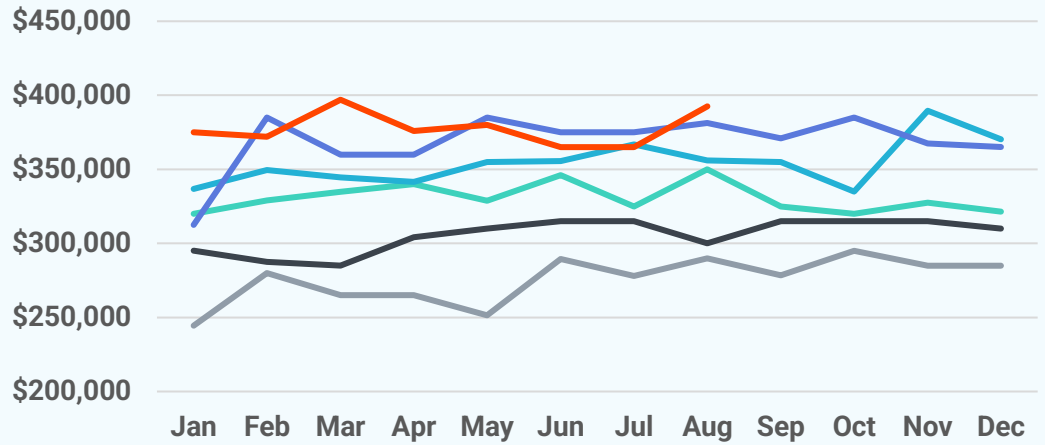
August 2025

+2.9%

Aug '25 vs. Aug '24
(Aug '24: \$381,390)

+7.5%

Aug '25 vs. Jul '25
(Jul '25: \$365,000)



Median Days on Market

27 days

August 2025

+14 days

Aug '25 vs. Aug '24
(Aug '24: 13 days)

+14 days

Aug '25 vs. Jul '25
(Jul '25: 13 days)



New Pending Sales

2025 2024 2020-2023 Range

79

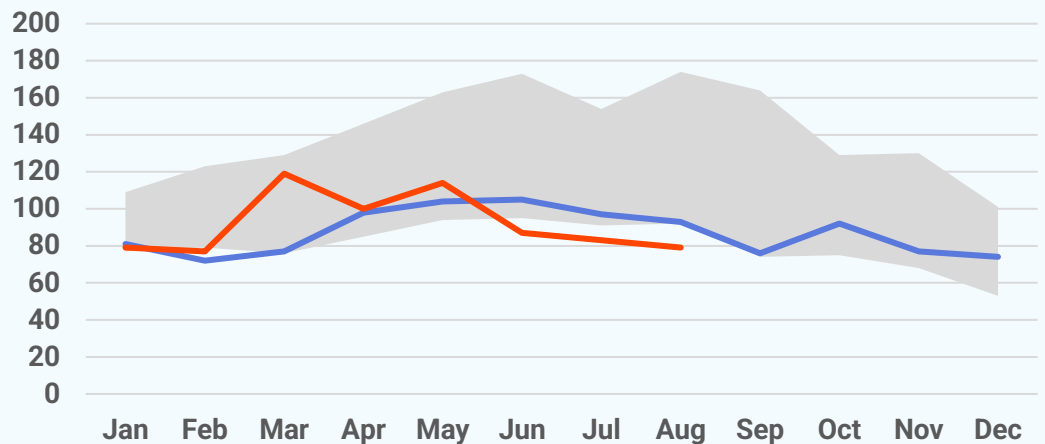
August 2025

-15.1%

Aug '25 vs. Aug '24
(Aug '24: 93)

-4.8%

Aug '25 vs. Jul '25
(Jul '25: 83)



New Listings

2025

2024

2020-2023 Range

93

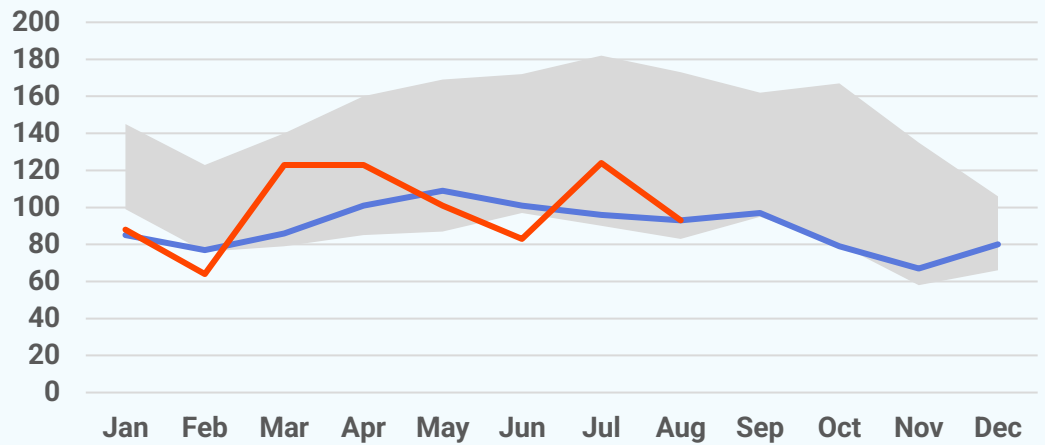
August 2025

+0.0%

Aug '25 vs. Aug '24
(Aug '24: 93)

-25.0%

Aug '25 vs. Jul '25
(Jul '25: 124)



Active Listings

198

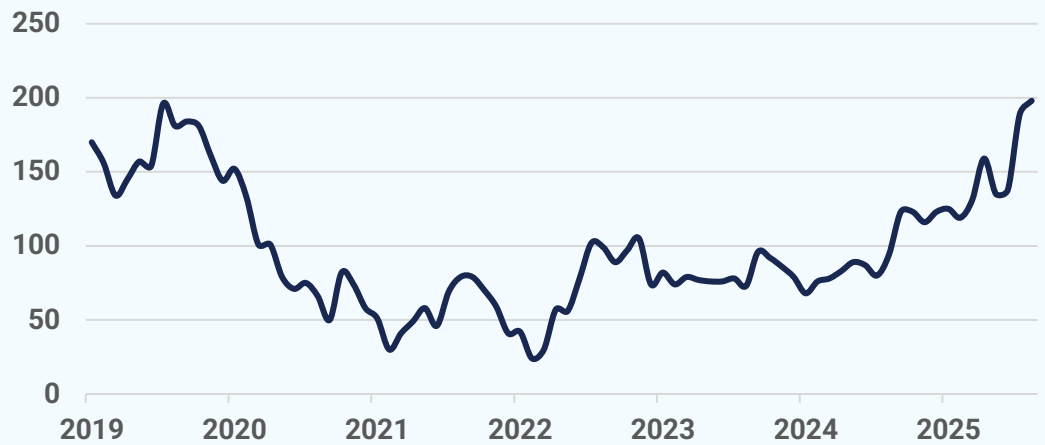
August 2025

+110.6%

Aug '25 vs. Aug '24
(Aug '24: 94)

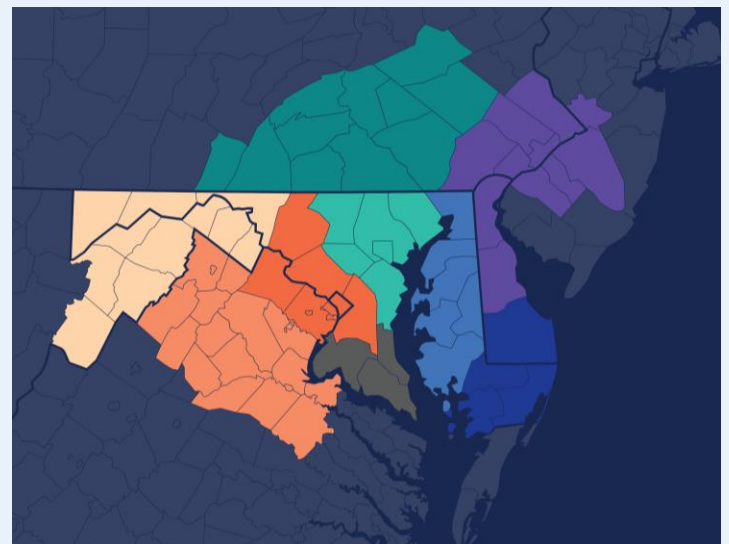
+4.8%

Aug '25 vs. Jul '25
(Jul '25: 189)



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August 2025 Condos Report

Prepared by Bright Research

Data as of September 5, 2025

Key Market Statistics	Aug 2025	Aug 2024	Change
Closed Sales	7	17	-58.8%
Median Sold Price	\$379,000	\$385,000	-1.6%
Median Days on Market	39 days	25 days	+14 days
New Pending Sales	12	11	+9.1%
New Listings	13	15	-13.3%
Active Listings	24	20	+20.0%
Months of Supply	3.00	1.67	+1.33 mos.

Closed Sales

2025

2024

2020-2023 Range

7

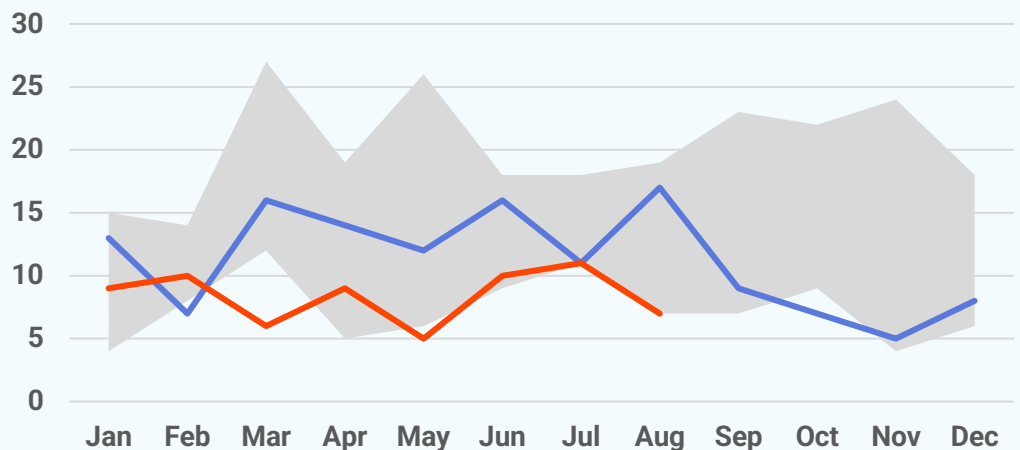
August 2025

-58.8%

Aug '25 vs. Aug '24
(Aug '24: 17)

-36.4%

Aug '25 vs. Jul '25
(Jul '25: 11)



Median Sold Price

2025 2024 2023 2022 2021 2020

\$379,000

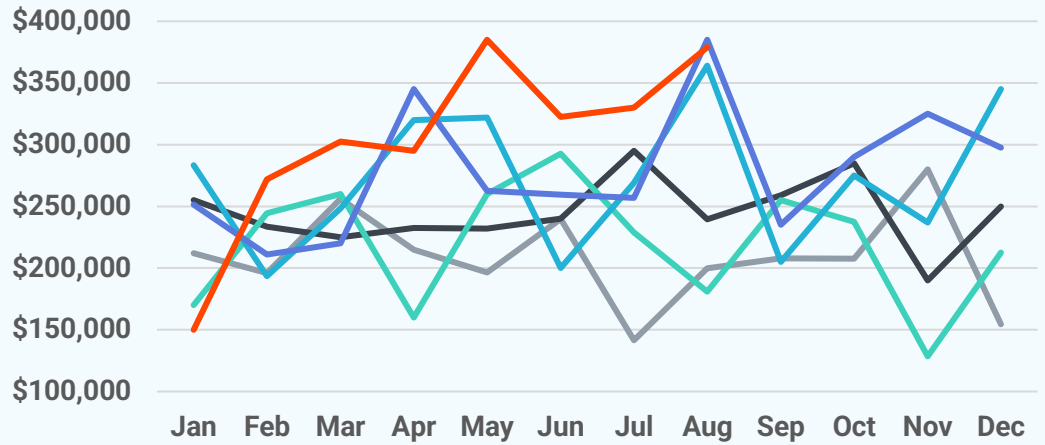
August 2025

-1.6%

Aug '25 vs. Aug '24
(Aug '24: \$385,000)

+14.8%

Aug '25 vs. Jul '25
(Jul '25: \$330,000)



Median Days on Market

39 days

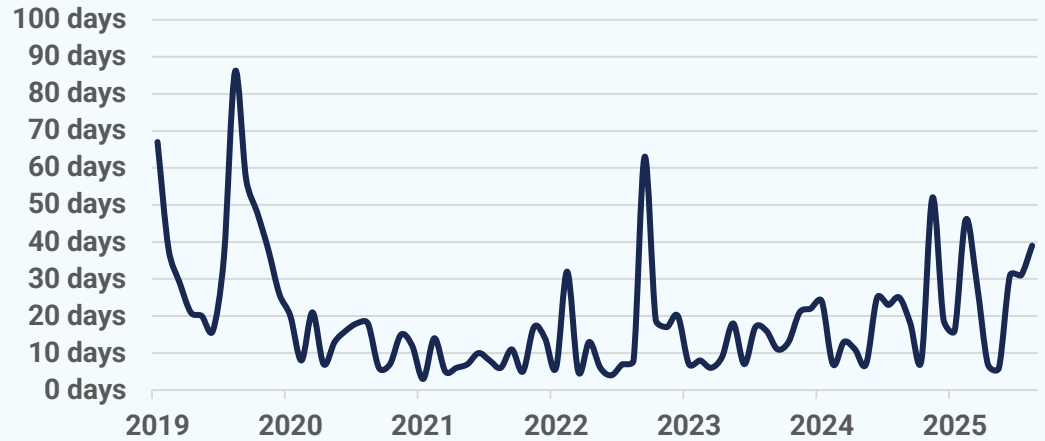
August 2025

+14 days

Aug '25 vs. Aug '24
(Aug '24: 25 days)

+8 days

Aug '25 vs. Jul '25
(Jul '25: 31 days)



New Pending Sales

2025 2024 2020-2023 Range

12

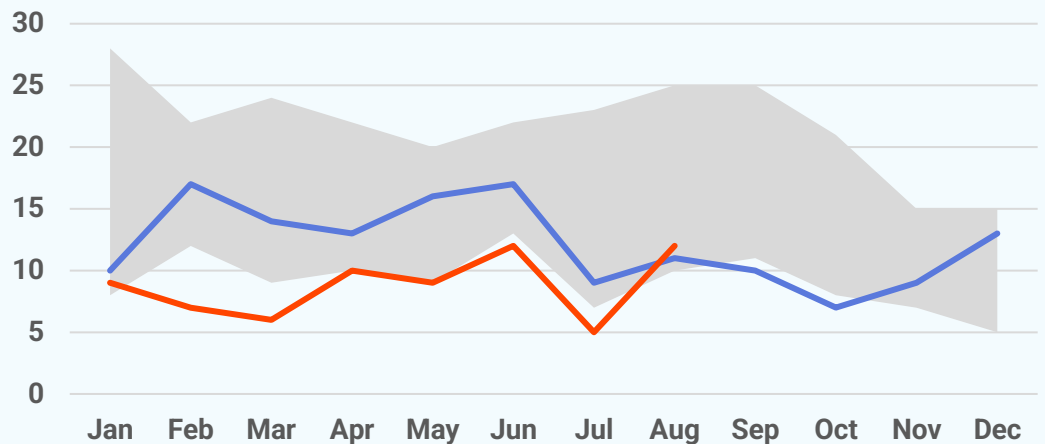
August 2025

+9.1%

Aug '25 vs. Aug '24
(Aug '24: 11)

+140.0%

Aug '25 vs. Jul '25
(Jul '25: 5)



New Listings

2025 2024 2020-2023 Range

13

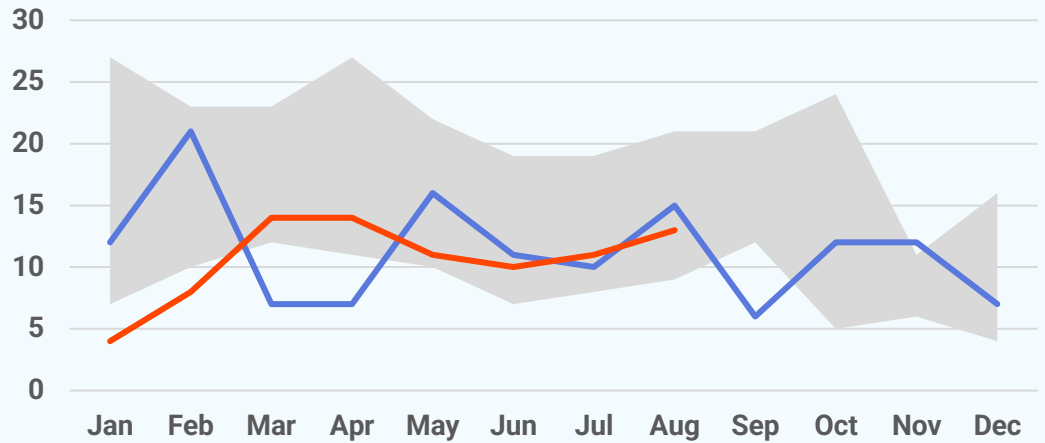
August 2025

-13.3%

Aug '25 vs. Aug '24
(Aug '24: 15)

+18.2%

Aug '25 vs. Jul '25
(Jul '25: 11)



Active Listings

24

August 2025

+20.0%

Aug '25 vs. Aug '24
(Aug '24: 20)

-14.3%

Aug '25 vs. Jul '25
(Jul '25: 28)



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