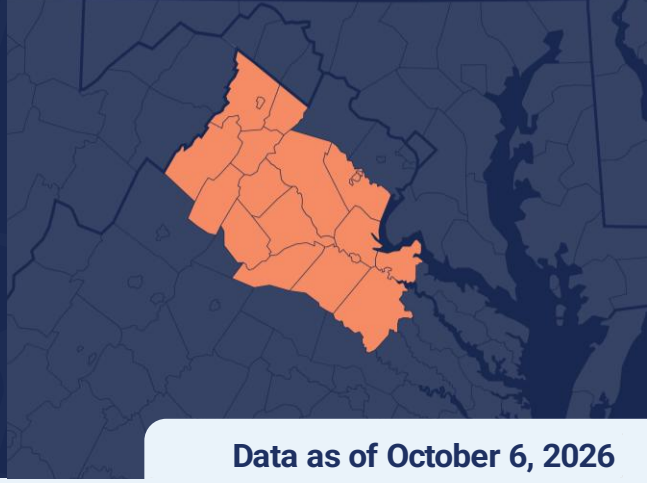
North Central Virginia

September 2026 Housing Market Report

Prepared by Bright Research



Data as of October 6, 2026

Key Market Statistics	Sep 2026	Sep 2025	Change	YTD 2026	YTD 2025	Change
Closed Sales	1,307	1,418	-7.8%	13,054	12,442	+4.9%
Median Sold Price	$490,000	$499,900	-2.0%	$509,990	$500,000	+2.0%
Median Days on Market	26 days	21 days	+5 days	16 days	13 days	+3 days
New Pending Sales	1,230	1,438	-14.5%	13,394	13,152	+1.8%
New Listings	1,802	1,698	+6.1%	19,596	18,134	+8.1%
Active Listings	4,580	3,522	+30.0%	4,580	3,522	+30.0%
Months of Supply	3.23	2.57	+0.66 mos.	3.23	2.57	+0.66 mos.
Showings	20,551	23,408	-12.2%	226,663	226,895	-0.1%

Housing Market Trends

September marks a shift in the North Central Virginia housing market. While year-to-date sales are running ahead of last year, the number of closed sales in September was 7.8% lower than a year ago.

Forward looking indicators of buyer activity suggest sales will continue to slow. There were 1,230 total pending sales in September, which was a 14.5% drop from a year ago. Showing activity is also lower than last year, with the number of showings 12.2% lower.

A total of 1,802 new listings came onto the market in September, a 6.1% increase over last year. New listings outpaced new pending contracts, leading to an increase in active inventory. Active listings are 30.0% higher than last year. Compared to 2019, the inventory of detached homes is still well below pre-pandemic levels while townhome and condo inventories are higher.

The median sold price was $490,000, which is down 2.0%, the first year-over-year price decline in the region in more than 10 years.

Market Outlook

As the average rate on the 30-year fixed rate mortgage rate moved higher than 7%, the North Central Virginia housing market is chilling. Many buyers are hitting affordability ceilings and will sit out the market until prices and mortgage rates ease. Expect a slow fall market, with sales this year falling short of last year's levels.

Weekly Avg. Mortgage Rate 30-yr fixed rate



Source: Freddie Mac

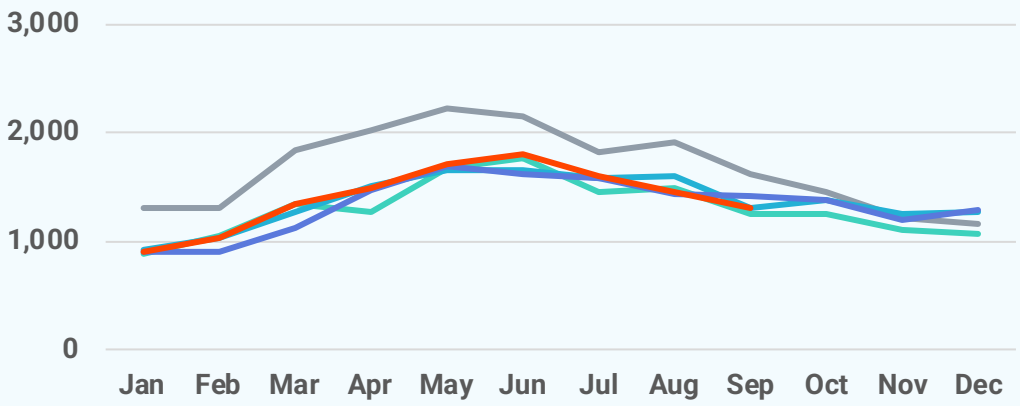
Closed Sales

2026 2025 2024 2023 2022

1,307
September 2026

-7.8%
Sep '26 vs. Sep '25
(Sep '25: 1,418)

-10.5%
Sep '26 vs. Aug '26
(Aug '26: 1,460)



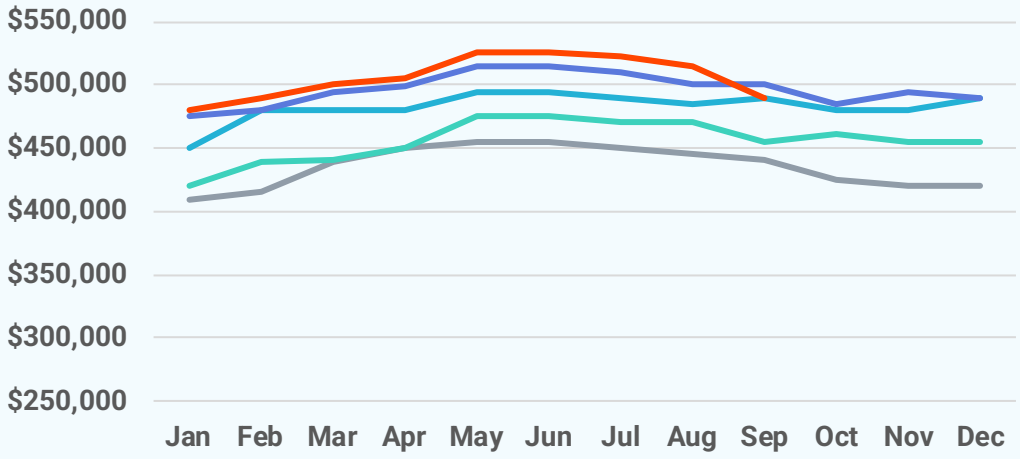
Median Sold Price

2026 2025 2024 2023 2022

$490,000
September 2026

-2.0%
Sep '26 vs. Sep '25
(Sep '25: $499,900)

-4.9%
Sep '26 vs. Aug '26
(Aug '26: $515,000)



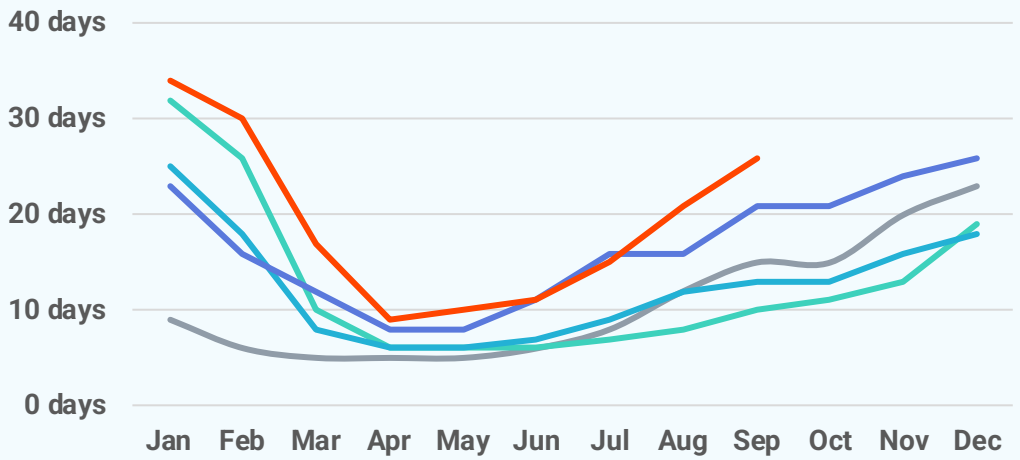
Median Days on Market

2026 2025 2024 2023 2022

26 days
September 2026

+5 days
Sep '26 vs. Sep '25
(Sep '25: 21 days)

+5 days
Sep '26 vs. Aug '26
(Aug '26: 21 days)



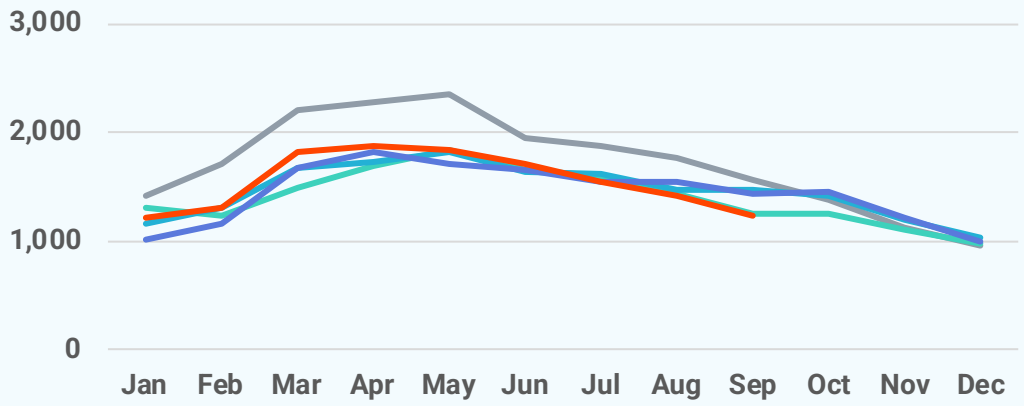
New Pending Sales

2026 2025 2024 2023 2022

1,230
September 2026

-14.5%
Sep '26 vs. Sep '25
(Sep '25: 1,438)

-13.3%
Sep '26 vs. Aug '26
(Aug '26: 1,419)



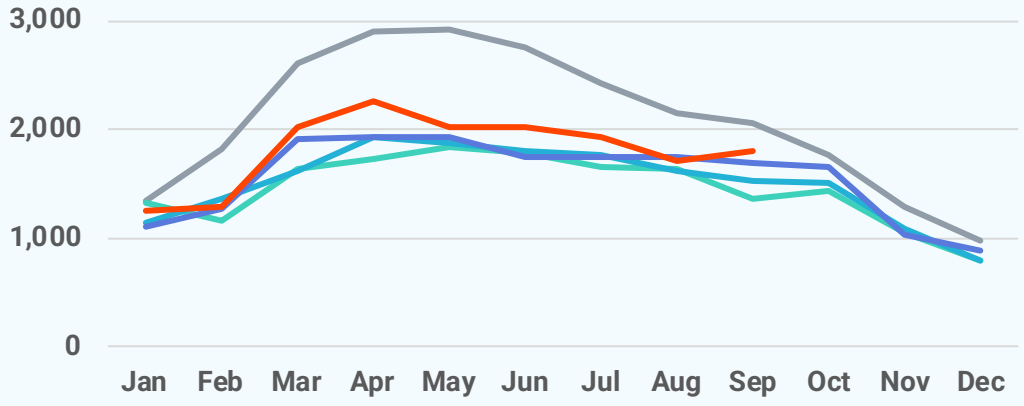
New Listings

2026 2025 2024 2023 2022

1,802
September 2026

+6.1%
Sep '26 vs. Sep '25
(Sep '25: 1,698)

+5.3%
Sep '26 vs. Aug '26
(Aug '26: 1,711)



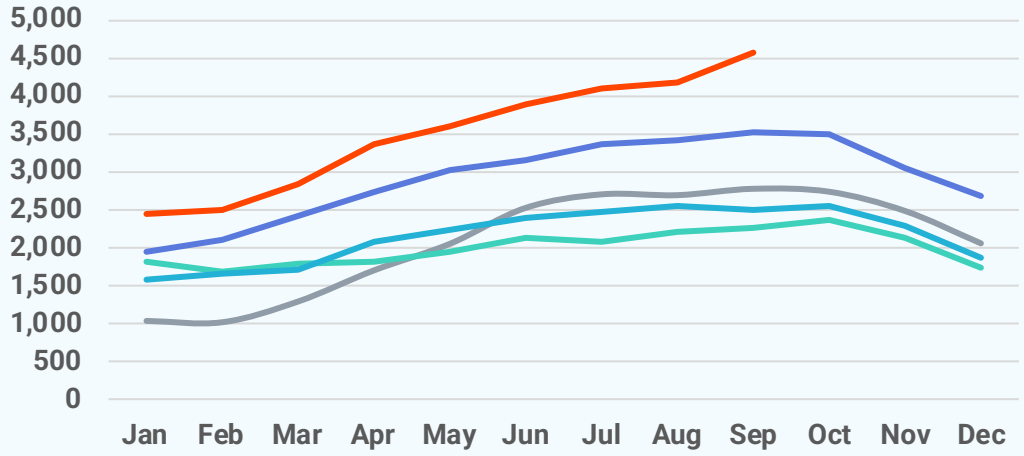
Active Listings

2026 2025 2024 2023 2022

4,580
September 2026

+30.0%
Sep '26 vs. Sep '25
(Sep '25: 3,522)

+9.4%
Sep '26 vs. Aug '26
(Aug '26: 4,186)



Local Markets	Closed Sales		Median Sales Price		Median Days on Market	
	Sep '26	vs. Sep '25	Sep '26	vs. Sep '25	Sep '26	vs. Sep '25
North Central VA	1,307	-7.8%	$490,000	-2.0%	26 days	+5 days
Caroline County, VA	25	-26.5%	$349,990	-13.6%	34 days	+10 days
Clarke County, VA	10	-33.3%	$627,500	+40.2%	37 days	+13 days
Culpeper County, VA	44	-31.3%	$475,500	-4.1%	30 days	-1 day
Fauquier County, VA	76	-9.5%	$631,495	+4.8%	18 days	+5 days
Frederick County, VA	126	-16.6%	$420,000	-6.7%	26 days	+5 days
Fredericksburg City, VA	28	+27.3%	$499,250	+2.4%	46 days	+5 days
King George County, VA	30	+76.5%	$457,500	-17.6%	41 days	+13 days
Madison County, VA	7	-56.3%	$410,000	+3.6%	36 days	-24 days
Manassas City, VA	36	-14.3%	$487,500	-4.1%	19 days	+2 days
Manassas Park City, VA	14	-12.5%	$471,000	-1.4%	31 days	+11 days
Orange County, VA	63	-16.0%	$395,000	+1.3%	55 days	+20 days
Page County, VA	28	+21.7%	$367,000	+14.7%	26 days	-21 days
Prince William County, VA	389	-2.0%	$579,990	-3.7%	19 days	+4 days
Rappahannock County, VA	5	-50.0%	$489,900	-7.0%	41 days	-6 days
Shenandoah County, VA	47	-24.2%	$359,000	+4.8%	39 days	+11 days
Spotsylvania County, VA	166	+4.4%	$475,000	+3.3%	32 days	+9 days
Stafford County, VA	135	-8.2%	$515,000	-0.8%	25 days	+4 days
Warren County, VA	52	-8.8%	$380,000	-5.0%	39 days	+24 days
Winchester City, VA	26	-3.7%	$368,000	-5.6%	65 days	+32 days

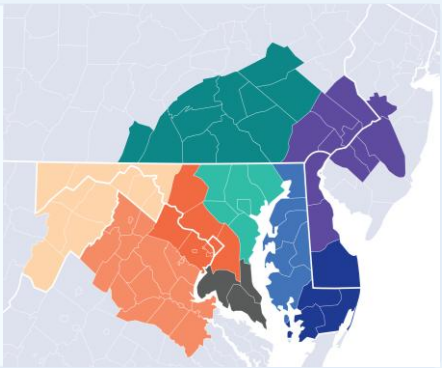
Local Markets	New Pending Sales		New Listings		Showings	
	Sep '26	vs. Sep '25	Sep '26	vs. Sep '25	Sep '26	vs. Sep '25
North Central VA	1,230	-14.5%	1,802	+6.1%	20,551	-12.2%
Caroline County, VA	32	-3.0%	56	+43.6%	595	+111.7%
Clarke County, VA	12	+0.0%	21	-16.0%	205	-21.8%
Culpeper County, VA	39	-31.6%	80	+9.6%	623	-17.7%
Fauquier County, VA	69	-20.7%	98	-6.7%	1,201	-8.3%
Frederick County, VA	123	-6.8%	164	+17.1%	1,714	-9.9%
Fredericksburg City, VA	25	+47.1%	23	-8.0%	326	+12.0%
King George County, VA	21	-34.4%	46	+64.3%	357	-11.2%
Madison County, VA	8	-50.0%	9	-52.6%	106	-27.4%
Manassas City, VA	41	+17.1%	48	+41.2%	542	-9.4%
Manassas Park City, VA	11	-50.0%	14	+0.0%	192	-40.7%
Orange County, VA	61	-22.8%	98	-30.0%	698	-4.9%
Page County, VA	22	-37.1%	30	+0.0%	259	+5.3%
Prince William County, VA	372	-17.1%	526	+5.4%	7,201	-20.4%
Rappahannock County, VA	7	+16.7%	8	-42.9%	88	-5.4%
Shenandoah County, VA	48	-20.0%	69	+21.1%	711	+33.9%
Spotsylvania County, VA	133	-8.3%	195	+8.3%	1,991	-20.6%
Stafford County, VA	151	+6.3%	217	+24.7%	2,548	-9.2%
Warren County, VA	40	-29.8%	75	+1.4%	837	+3.6%
Winchester City, VA	15	-31.8%	25	-10.7%	357	-3.0%

Local Markets

	Active Listings		Months of Supply	
	Sep '26	vs. Sep '25	Sep '26	vs. Sep '25
North Central VA	4,580	+30.0%	3.23	+0.66 months
Caroline County, VA	131	+32.3%	4.23	+1.62 months
Clarke County, VA	72	+56.5%	4.50	+1.21 months
Culpeper County, VA	266	+26.7%	4.93	+0.73 months
Fauquier County, VA	286	+29.4%	3.49	+0.66 months
Frederick County, VA	453	+39.4%	3.68	+1.22 months
Fredericksburg City, VA	72	+18.0%	3.27	+0.5 months
King George County, VA	135	+98.5%	5.19	+2.47 months
Madison County, VA	33	-25.0%	3.00	-1.4 months
Manassas City, VA	86	+28.4%	2.15	+0.29 months
Manassas Park City, VA	31	+47.6%	2.21	+1.04 months
Orange County, VA	265	+1.5%	3.90	-0.52 months
Page County, VA	107	+23.0%	4.28	-0.55 months
Prince William County, VA	1,055	+35.3%	2.38	+0.52 months
Rappahannock County, VA	49	+28.9%	7.00	+1.57 months
Shenandoah County, VA	201	+45.7%	4.02	+1.31 months
Spotsylvania County, VA	489	+17.0%	3.09	+0.34 months
Stafford County, VA	522	+22.5%	3.13	+0.47 months
Warren County, VA	228	+55.1%	4.65	+1.65 months
Winchester City, VA	99	+52.3%	3.81	+1.49 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

North Central Virginia

September 2026 Detached Single-Family Home Report

Prepared by Bright Research

Data as of October 6, 2026

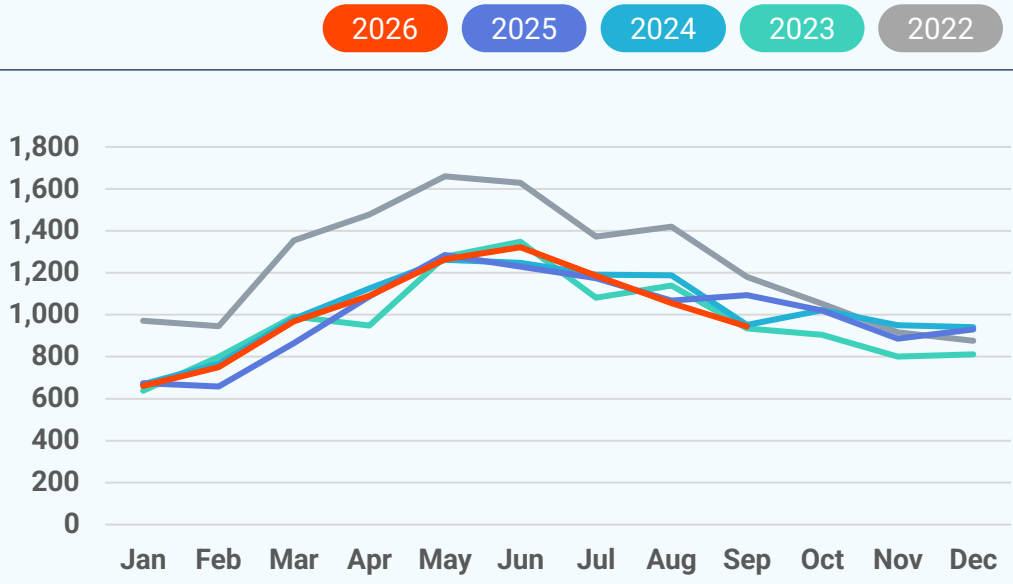
Key Market Statistics	Sep 2026	Sep 2025	Change
Closed Sales	944	1,093	-13.6%
Median Sold Price	$525,000	$520,000	+1.0%
Median Days on Market	26 days	22 days	+4 days
New Pending Sales	882	1,064	-17.1%
New Listings	1,353	1,290	+4.9%
Active Listings	3,618	2,817	+28.4%
Months of Supply	3.50	2.75	+0.75 mos.

Closed Sales

944
September 2026

-13.6%
Sep '26 vs. Sep '25
(Sep '25: 1,093)

-10.6%
Sep '26 vs. Aug '26
(Aug '26: 1,056)



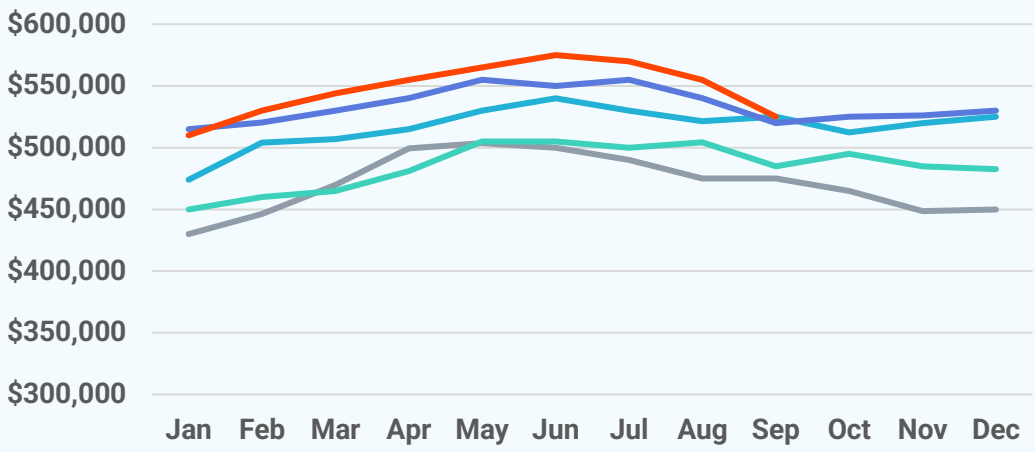
Median Sold Price

2026 2025 2024 2023 2022

$525,000
September 2026

+1.0%
Sep '26 vs. Sep '25
(Sep '25: $520,000)

-5.4%
Sep '26 vs. Aug '26
(Aug '26: $555,000)



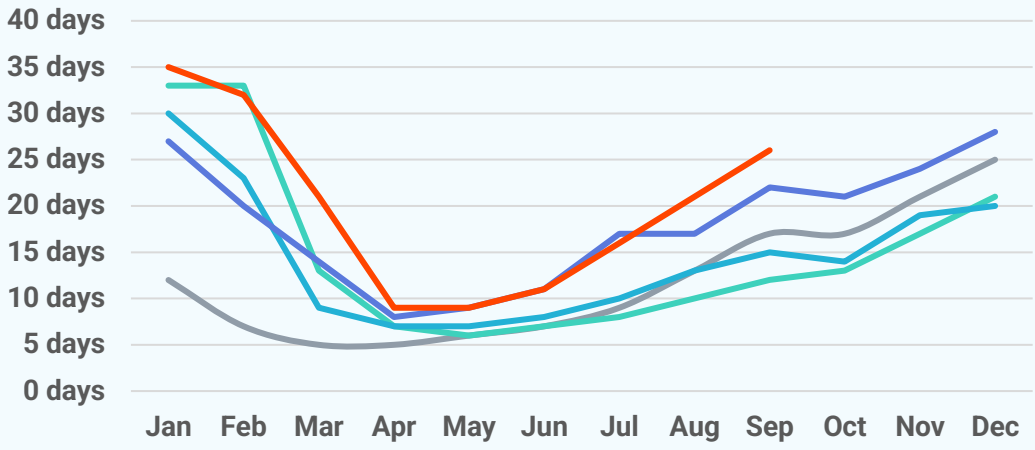
Median Days on Market

2026 2025 2024 2023 2022

26 days
September 2026

+4 days
Sep '26 vs. Sep '25
(Sep '25: 22 days)

+5 days
Sep '26 vs. Aug '26
(Aug '26: 21 days)



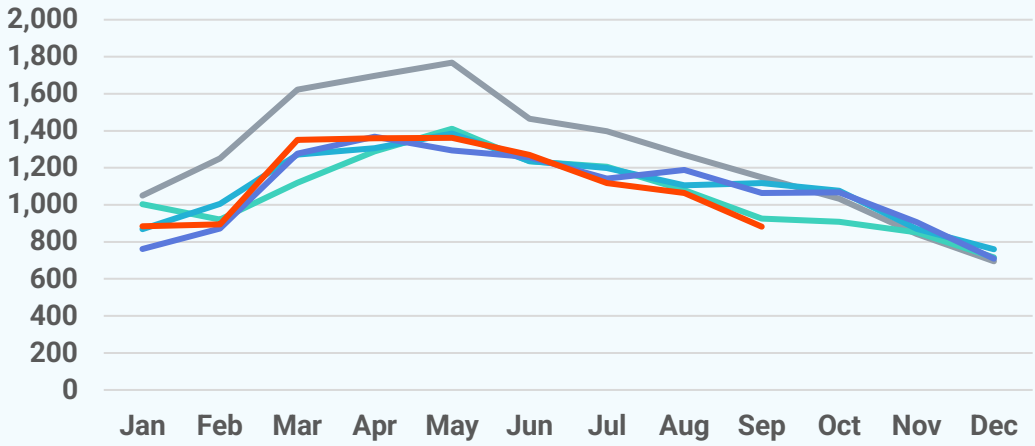
New Pending Sales

2026 2025 2024 2023 2022

882
September 2026

-17.1%
Sep '26 vs. Sep '25
(Sep '25: 1,064)

-17.1%
Sep '26 vs. Aug '26
(Aug '26: 1,064)



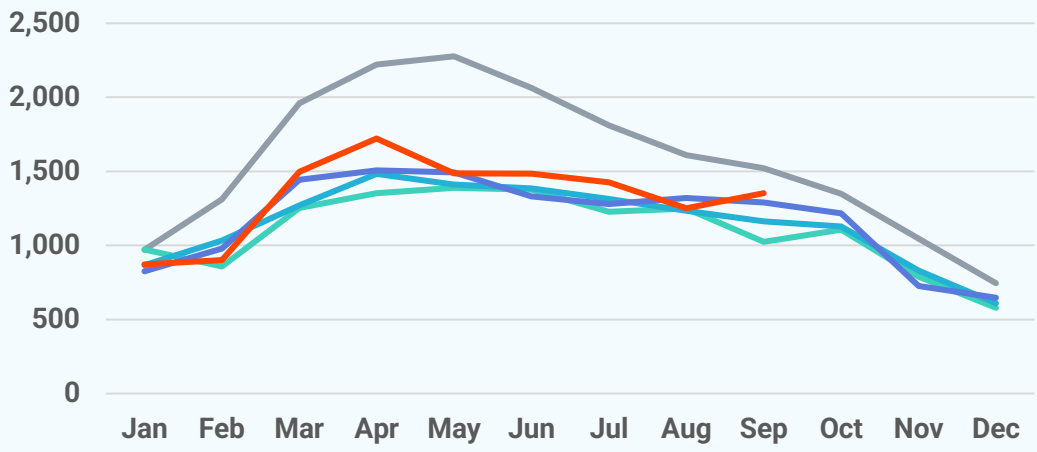
New Listings

2026 2025 2024 2023 2022

1,353
September 2026

+4.9%
Sep '26 vs. Sep '25
(Sep '25: 1,290)

+8.1%
Sep '26 vs. Aug '26
(Aug '26: 1,252)



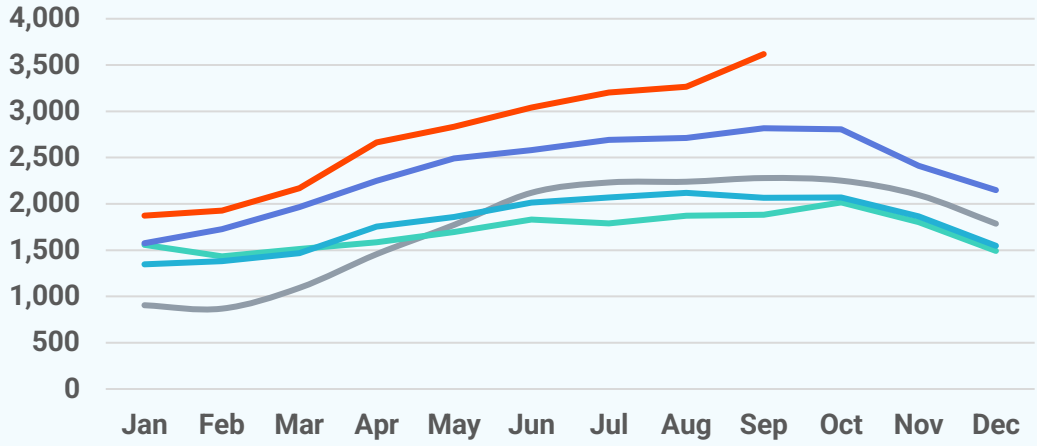
Active Listings

2026 2025 2024 2023 2022

3,618
September 2026

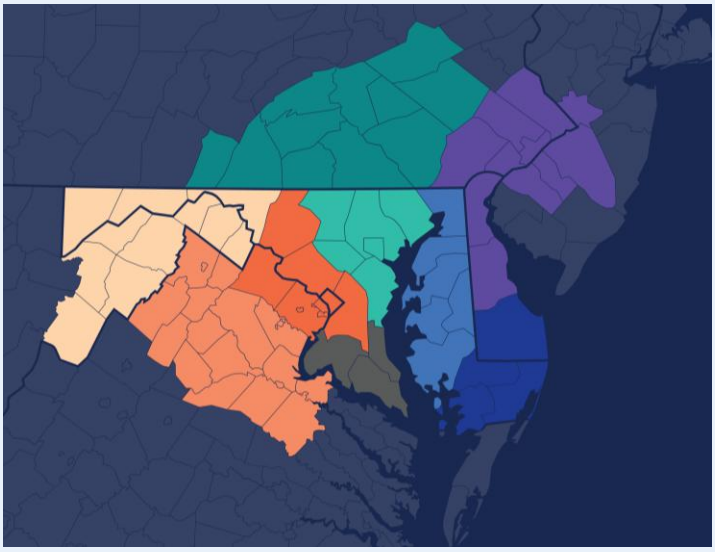
+28.4%
Sep '26 vs. Sep '25
(Sep '25: 2,817)

+10.8%
Sep '26 vs. Aug '26
(Aug '26: 3,265)



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**.



North Central Virginia

September 2026 Attached/Townhomes Report

Prepared by Bright Research

Data as of October 6, 2026

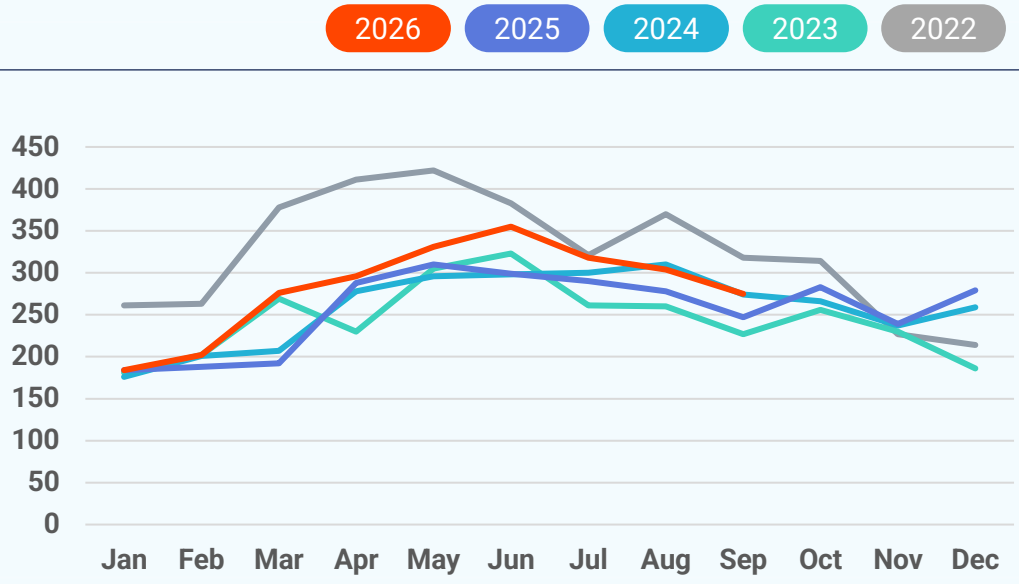
Key Market Statistics	Sep 2026	Sep 2025	Change
Closed Sales	275	247	+11.3%
Median Sold Price	$416,990	$415,000	+0.5%
Median Days on Market	25 days	15 days	+10 days
New Pending Sales	268	280	-4.3%
New Listings	333	314	+6.1%
Active Listings	663	495	+33.9%
Months of Supply	2.30	1.90	+0.40 mos.

Closed Sales

275
September 2026

+11.3%
Sep '26 vs. Sep '25
(Sep '25: 247)

-9.5%
Sep '26 vs. Aug '26
(Aug '26: 304)



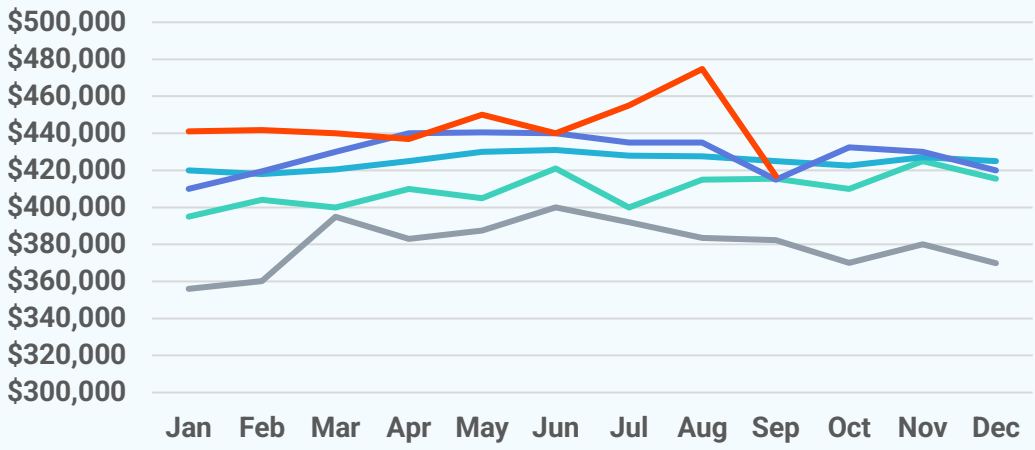
Median Sold Price

2026 2025 2024 2023 2022

$416,990
September 2026

+0.5%
Sep '26 vs. Sep '25
(Sep '25: $415,000)

-12.2%
Sep '26 vs. Aug '26
(Aug '26: $474,745)



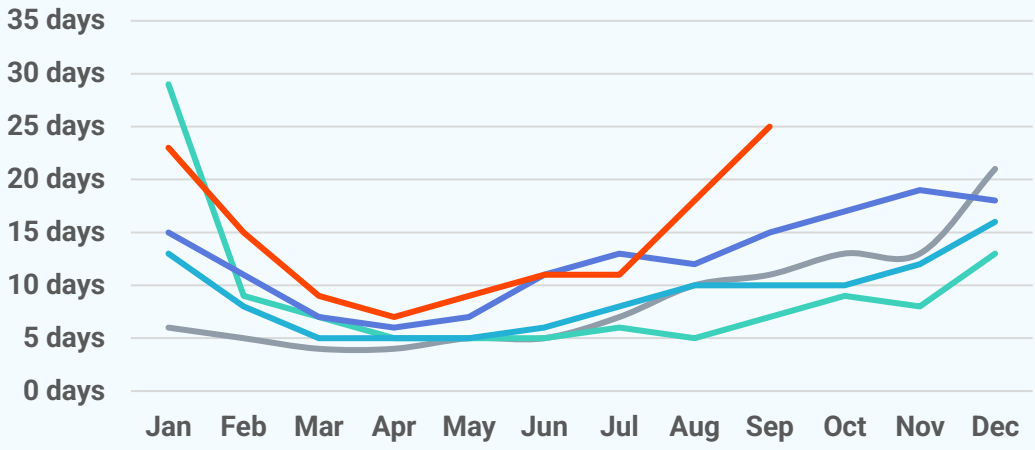
Median Days on Market

2026 2025 2024 2023 2022

25 days
September 2026

+10 days
Sep '26 vs. Sep '25
(Sep '25: 15 days)

+7 days
Sep '26 vs. Aug '26
(Aug '26: 18 days)



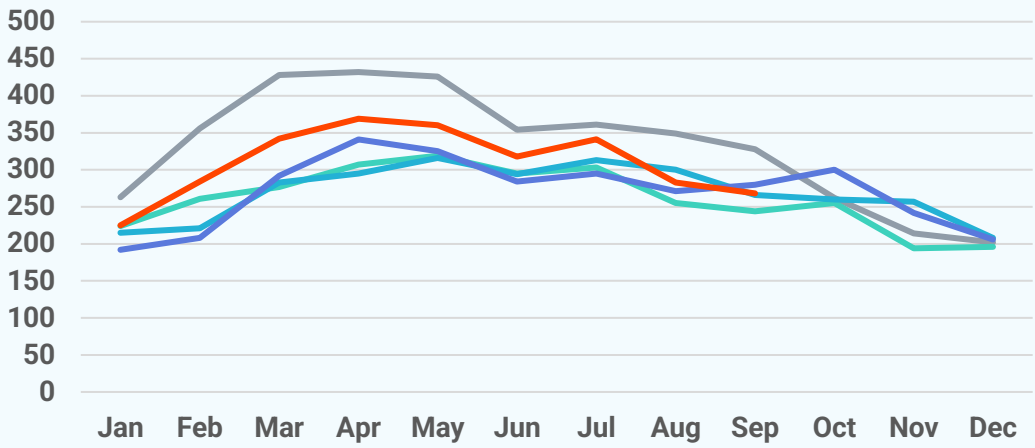
New Pending Sales

2026 2025 2024 2023 2022

268
September 2026

-4.3%
Sep '26 vs. Sep '25
(Sep '25: 280)

-5.3%
Sep '26 vs. Aug '26
(Aug '26: 283)



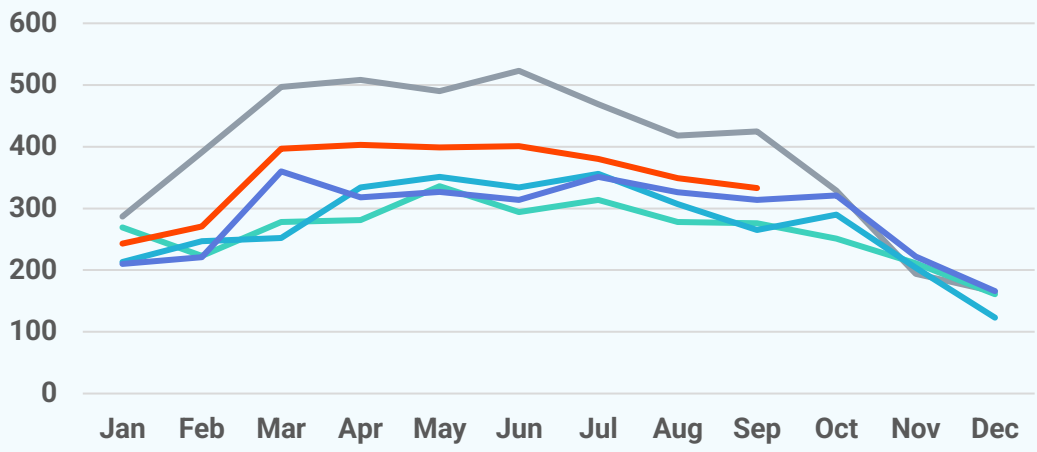
New Listings

2026 2025 2024 2023 2022

333
September 2026

+6.1%
Sep '26 vs. Sep '25
(Sep '25: 314)

-4.6%
Sep '26 vs. Aug '26
(Aug '26: 349)



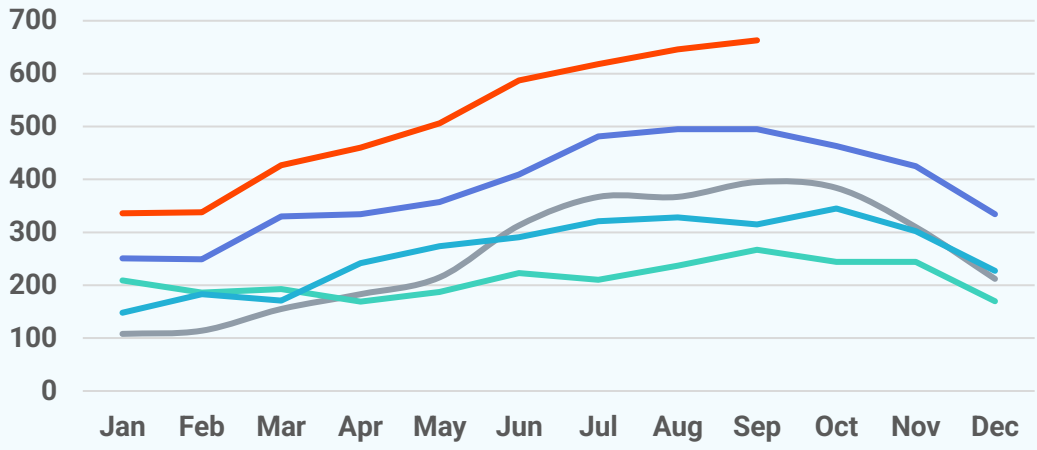
Active Listings

2026 2025 2024 2023 2022

663
September 2026

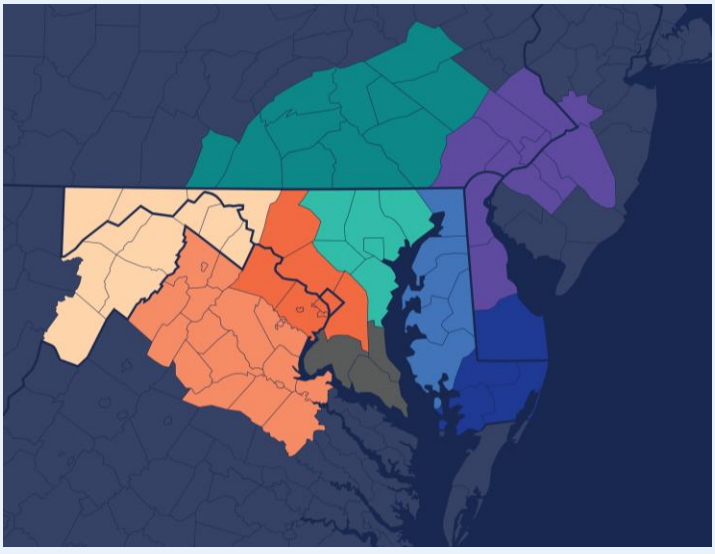
+33.9%
Sep '26 vs. Sep '25
(Sep '25: 495)

+2.6%
Sep '26 vs. Aug '26
(Aug '26: 646)



About Bright MLS

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North Central Virginia

September 2026 Condos Report

Prepared by Bright Research

Data as of October 6, 2026

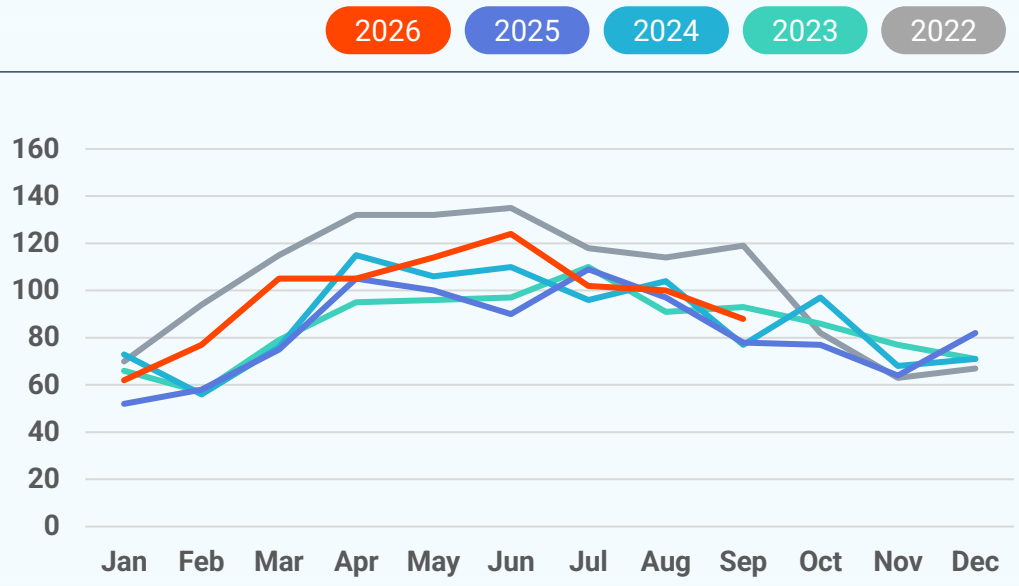
Key Market Statistics	Sep 2026	Sep 2025	Change
Closed Sales	88	78	+12.8%
Median Sold Price	$453,090	$412,500	+9.8%
Median Days on Market	41 days	30 days	+11 days
New Pending Sales	79	94	-16.0%
New Listings	114	93	+22.6%
Active Listings	299	210	+42.4%
Months of Supply	3.15	2.44	+0.71 mos.

Closed Sales

88
September 2026

+12.8%
Sep '26 vs. Sep '25
(Sep '25: 78)

-12.0%
Sep '26 vs. Aug '26
(Aug '26: 100)



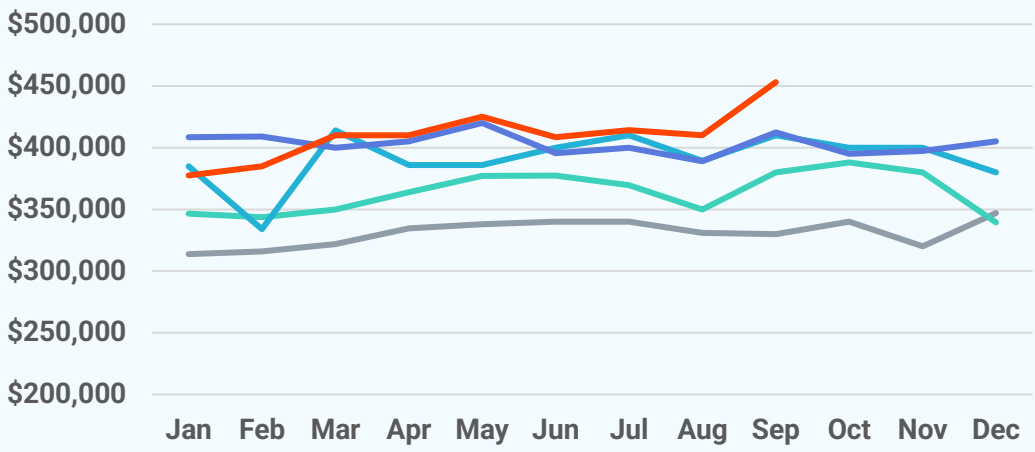
Median Sold Price

2026 2025 2024 2023 2022

$453,090
September 2026

+9.8%
Sep '26 vs. Sep '25
(Sep '25: $412,500)

+10.5%
Sep '26 vs. Aug '26
(Aug '26: $409,950)



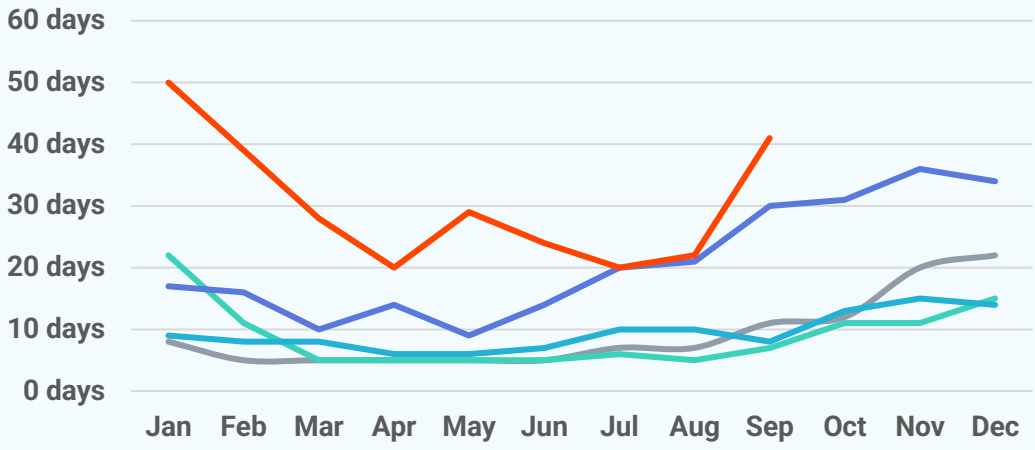
Median Days on Market

2026 2025 2024 2023 2022

41 days
September 2026

+11 days
Sep '26 vs. Sep '25
(Sep '25: 30 days)

+19 days
Sep '26 vs. Aug '26
(Aug '26: 22 days)



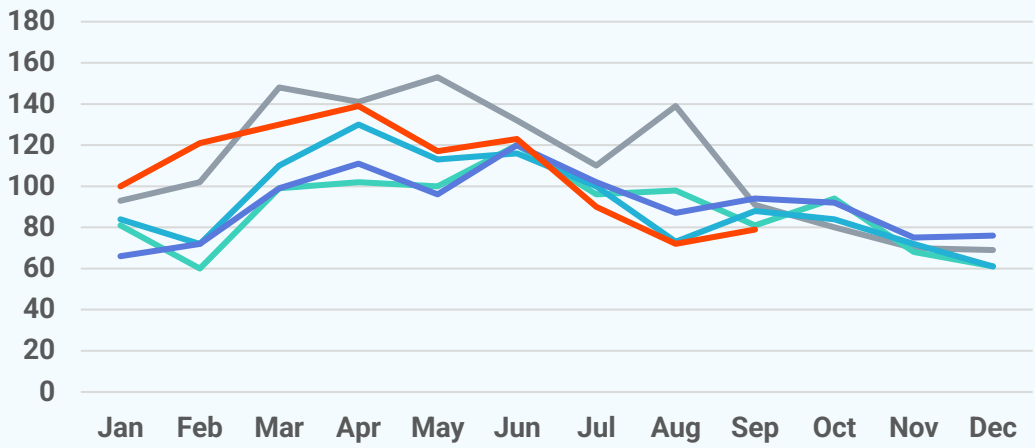
New Pending Sales

2026 2025 2024 2023 2022

79
September 2026

-16.0%
Sep '26 vs. Sep '25
(Sep '25: 94)

+9.7%
Sep '26 vs. Aug '26
(Aug '26: 72)



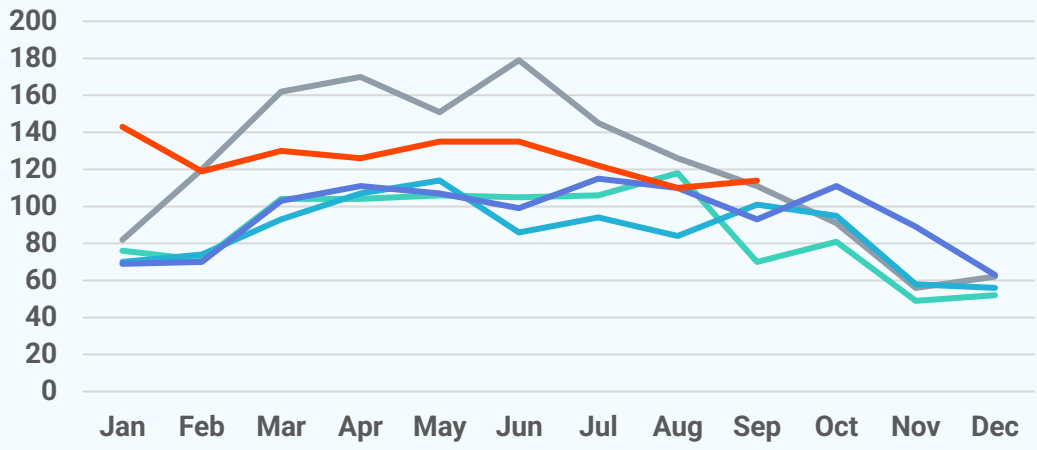
New Listings

2026 2025 2024 2023 2022

114
September 2026

+22.6%
Sep '26 vs. Sep '25
(Sep '25: 93)

+3.6%
Sep '26 vs. Aug '26
(Aug '26: 110)



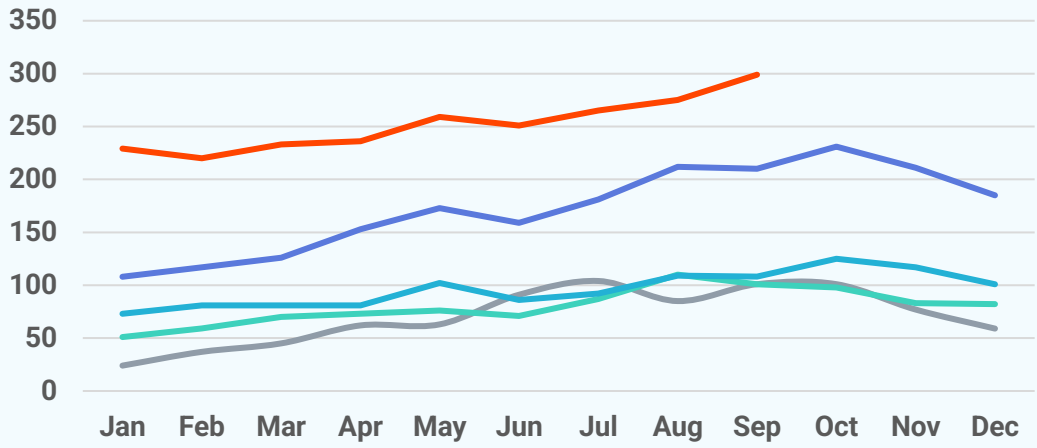
Active Listings

2026 2025 2024 2023 2022

299
September 2026

+42.4%
Sep '26 vs. Sep '25
(Sep '25: 210)

+8.7%
Sep '26 vs. Aug '26
(Aug '26: 275)



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**.

