

February 2026 Housing Market Report

Prepared by Bright Research

Data as of March 5, 2026

Key Market Statistics	Feb 2026	Feb 2025	Change	YTD 2026	YTD 2025	Change
Closed Sales	1,030	905	+13.8%	1,977	1,840	+7.4%
Median Sold Price	\$490,000	\$479,999	+2.1%	\$485,000	\$475,000	+2.1%
Median Days on Market	30 days	16 days	+14 days	31 days	20 days	+11 days
New Pending Sales	1,300	1,152	+12.8%	2,472	2,129	+16.1%
New Listings	1,291	1,270	+1.7%	2,794	2,571	+8.7%
Active Listings	2,486	2,092	+18.8%	2,486	2,092	+18.8%
Months of Supply	1.80	1.49	+0.31 mos.	1.80	1.49	+0.31 mos.
Showings	21,530	19,542	+10.2%	41,584	37,466	+11.0%

Housing Market Trends

Strong buyer turnout in North Central Virginia in February. Home sales were fairly flat in January but sprung to life in February with 1,030 closed sales, a 13.8% year-over-year increase. Frederick, Prince William, Spotsylvania, and Stafford counties all reported growth in closed sales.

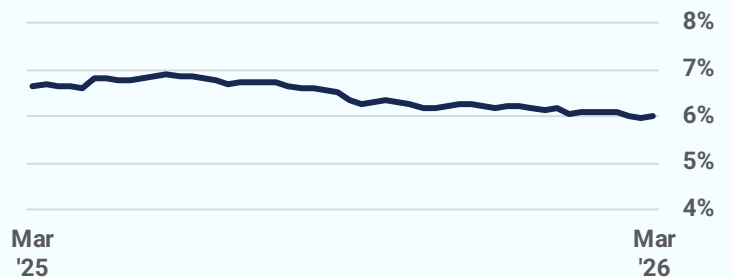
New pending sales were also up strongly in February. There were 1,300 new pending sales in February 2026, jumping up 12.8% compared to a year ago. Pending sales were a mixed bag in the region, as Prince William and Stafford counties had gains while Frederick and Spotsylvania counties were lower.

Seller activity appears lukewarm compared to the interest among buyers. Overall new listings in the region increased by only 1.7% in February. With homes remaining on the market longer, however, month-end active inventory was up 18.8% compared to last year.

Market Outlook

North Central Virginia has had a strong start to the year relative to other areas of the Mid-Atlantic. More favorable mortgage rates, higher supply, and pent-up demand have fueled market activity. However, sellers are still holding back, perhaps waiting for greater certainty.

Weekly Avg. Mortgage Rate 30-yr fixed rate



Source: Freddie Mac

Closed Sales

2026

2025

2024

2023

2022

1,030

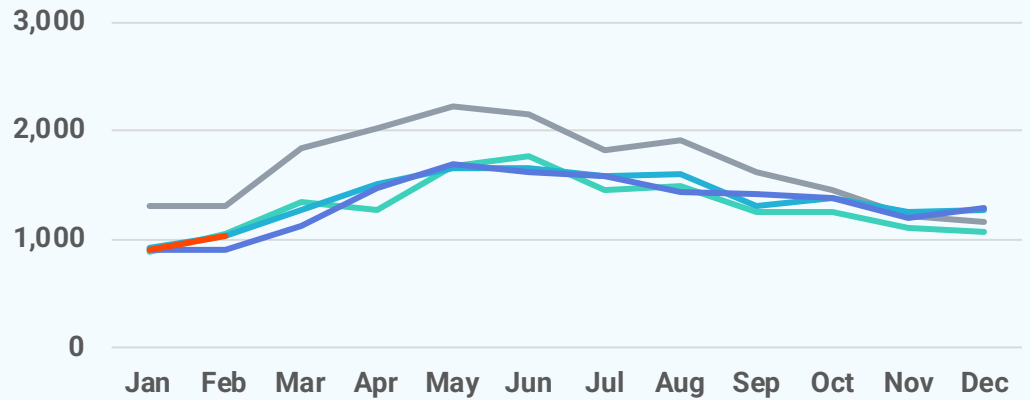
February 2026

+13.8%

Feb '26 vs. Feb '25
(Feb '25: 905)

+13.6%

Feb '26 vs. Jan '26
(Jan '26: 907)



Median Sold Price

2026

2025

2024

2023

2022

\$490,000

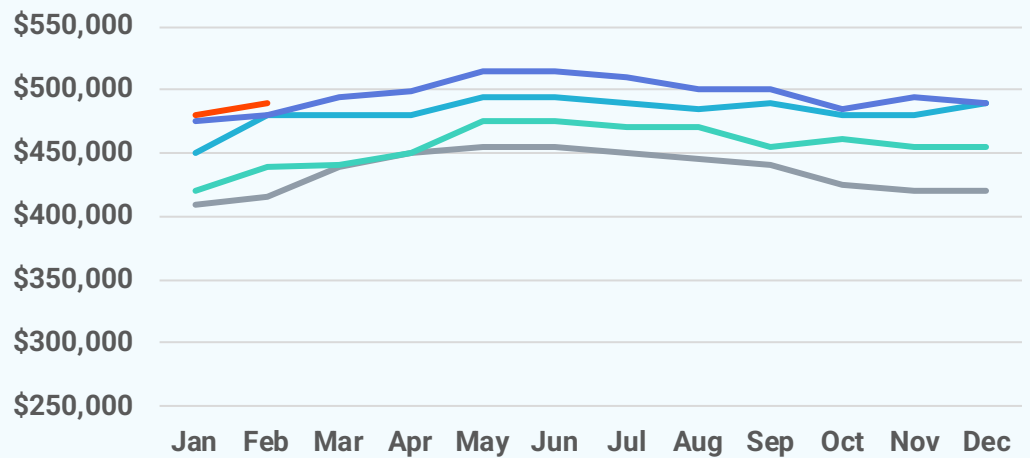
February 2026

+2.1%

Feb '26 vs. Feb '25
(Feb '25: \$479,999)

+2.1%

Feb '26 vs. Jan '26
(Jan '26: \$480,000)



Median Days on Market

2026

2025

2024

2023

2022

30 days

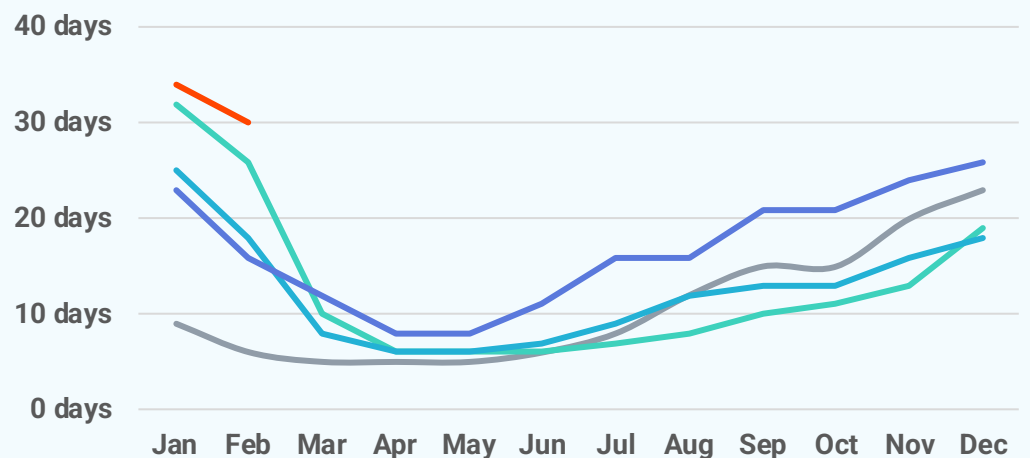
February 2026

+14 days

Feb '26 vs. Feb '25
(Feb '25: 16 days)

-4 days

Feb '26 vs. Jan '26
(Jan '26: 34 days)



New Pending Sales

2026

2025

2024

2023

2022

1,300

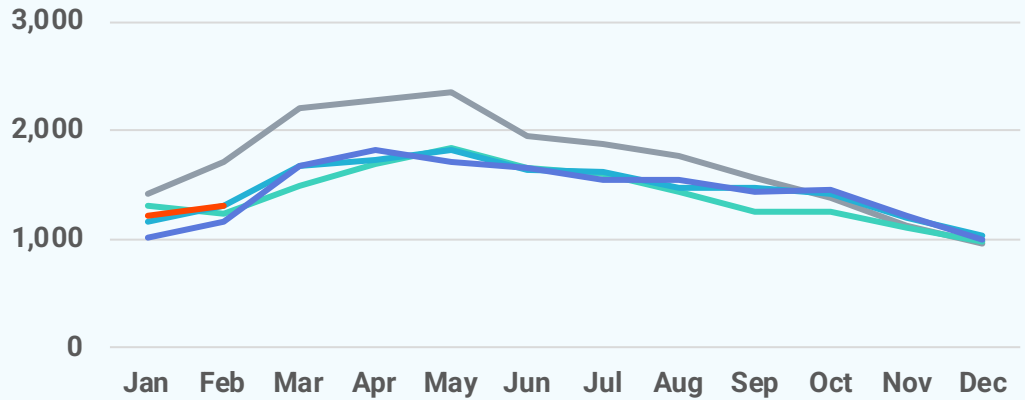
February 2026

+12.8%

Feb '26 vs. Feb '25
(Feb '25: 1,152)

+7.5%

Feb '26 vs. Jan '26
(Jan '26: 1,209)



New Listings

2026

2025

2024

2023

2022

1,291

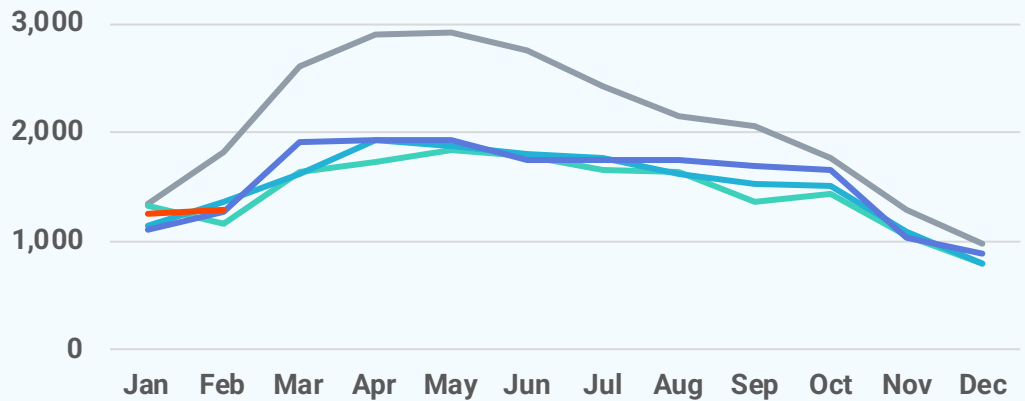
February 2026

+1.7%

Feb '26 vs. Feb '25
(Feb '25: 1,270)

+2.5%

Feb '26 vs. Jan '26
(Jan '26: 1,259)



Active Listings

2026

2025

2024

2023

2022

2,486

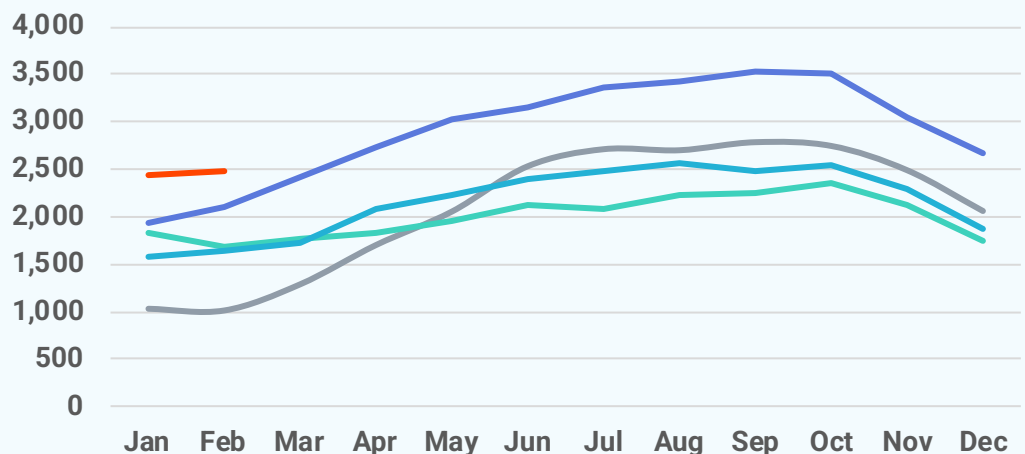
February 2026

+18.8%

Feb '26 vs. Feb '25
(Feb '25: 2,092)

+2.0%

Feb '26 vs. Jan '26
(Jan '26: 2,438)



Local Markets	Closed Sales		Median Sales Price		Median Days on Market	
	Feb '26	vs. Feb '25	Feb '26	vs. Feb '25	Feb '26	vs. Feb '25
North Central VA	1,030	+13.8%	\$490,000	+2.1%	30 days	+14 days
Caroline County, VA	19	-34.5%	\$315,000	-19.2%	64 days	+42 days
Clarke County, VA	15	+114.3%	\$641,000	+13.9%	20 days	+11 days
Culpeper County, VA	42	+16.7%	\$585,000	+6.3%	37 days	+15 days
Fauquier County, VA	46	-6.1%	\$690,000	+19.0%	21 days	-18 days
Frederick County, VA	104	+3.0%	\$420,500	+1.3%	52 days	+30 days
Fredericksburg City, VA	18	+5.9%	\$552,495	+15.8%	44 days	+14 days
King George County, VA	25	+47.1%	\$489,900	-3.9%	60 days	+36 days
Madison County, VA	12	+71.4%	\$453,250	+31.4%	16 days	-19 days
Manassas City, VA	29	+70.6%	\$464,000	-17.1%	17 days	+11 days
Manassas Park City, VA	6	-53.8%	\$455,000	-7.1%	31 days	+21 days
Orange County, VA	40	-4.8%	\$418,580	-6.4%	41 days	-10 days
Page County, VA	18	+50.0%	\$353,450	+45.0%	32 days	-19 days
Prince William County, VA	299	+11.2%	\$569,000	+3.5%	17 days	+10 days
Rappahannock County, VA	4	-60.0%	\$607,000	+32.0%	73 days	+11 days
Shenandoah County, VA	41	+24.2%	\$334,900	-4.0%	39 days	-5 days
Spotsylvania County, VA	123	+51.9%	\$474,500	+4.3%	31 days	+5 days
Stafford County, VA	131	+10.1%	\$510,000	-2.9%	30 days	+11 days
Warren County, VA	35	+52.2%	\$382,000	-4.5%	41 days	+11 days
Winchester City, VA	23	+0.0%	\$385,000	+4.1%	42 days	+30 days

Local Markets	New Pending Sales		New Listings		Showings	
	Feb '26	vs. Feb '25	Feb '26	vs. Feb '25	Feb '26	vs. Feb '25
North Central VA	1,300	+12.8%	1,291	+1.7%	21,530	+10.2%
Caroline County, VA	29	-42.0%	29	-45.3%	467	+53.1%
Clarke County, VA	16	+166.7%	18	+80.0%	213	+41.1%
Culpeper County, VA	45	+36.4%	40	-25.9%	575	+36.9%
Fauquier County, VA	77	+28.3%	77	-4.9%	1,130	+24.7%
Frederick County, VA	116	-4.1%	119	-13.8%	1,151	-14.1%
Fredericksburg City, VA	16	-23.8%	24	+26.3%	260	-9.7%
King George County, VA	18	-40.0%	22	-18.5%	351	+1.2%
Madison County, VA	5	-16.7%	7	-30.0%	58	-42.6%
Manassas City, VA	36	+38.5%	33	+50.0%	629	+44.3%
Manassas Park City, VA	18	+0.0%	16	+0.0%	294	+14.8%
Orange County, VA	66	+10.0%	91	+56.9%	610	+12.1%
Page County, VA	29	+81.3%	22	-26.7%	364	+57.6%
Prince William County, VA	412	+22.3%	385	+7.5%	8,174	+3.6%
Rappahannock County, VA	6	+200.0%	4	+100.0%	74	+29.8%
Shenandoah County, VA	46	-9.8%	36	-16.3%	438	-22.5%
Spotsylvania County, VA	137	-3.5%	124	-31.5%	2,664	+13.6%
Stafford County, VA	149	+22.1%	174	+46.2%	3,015	+26.1%
Warren County, VA	45	+28.6%	39	+5.4%	727	+7.4%
Winchester City, VA	34	+112.5%	31	+158.3%	336	+15.5%

Local Markets

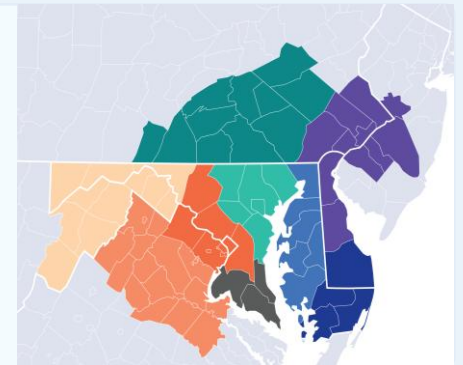
Active Listings

Months of Supply

	Feb '26	vs. Feb '25	Feb '26	vs. Feb '25
North Central VA	2,486	+18.8%	1.80	+0.31 months
Caroline County, VA	67	-16.3%	1.91	-0.14 months
Clarke County, VA	38	+90.0%	2.53	+1.1 months
Culpeper County, VA	134	+14.5%	2.63	+0.42 months
Fauquier County, VA	151	+10.2%	1.96	+0.16 months
Frederick County, VA	262	+0.4%	2.02	+0.01 months
Fredericksburg City, VA	50	+4.2%	2.27	+0.18 months
King George County, VA	58	+26.1%	2.32	+0.79 months
Madison County, VA	27	-15.6%	2.45	-0.22 months
Manassas City, VA	49	+48.5%	1.36	+0.47 months
Manassas Park City, VA	28	+115.4%	1.65	+0.89 months
Orange County, VA	195	+43.4%	3.10	+0.71 months
Page County, VA	67	+31.4%	3.19	+0.76 months
Prince William County, VA	511	+30.0%	1.21	+0.3 months
Rappahannock County, VA	28	+21.7%	4.67	+1.38 months
Shenandoah County, VA	94	+8.0%	1.81	+0.1 months
Spotsylvania County, VA	267	+2.7%	1.71	+0.02 months
Stafford County, VA	306	+36.0%	1.91	+0.5 months
Warren County, VA	99	-4.8%	2.06	+0.02 months
Winchester City, VA	55	+111.5%	2.04	+1.14 months

Local Market Map

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



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

February 2026 Detached Single-Family Home Report

Prepared by Bright Research

Data as of March 5, 2026

Key Market Statistics	Feb 2026	Feb 2025	Change
Closed Sales	751	658	+14.1%
Median Sold Price	\$530,000	\$520,300	+1.9%
Median Days on Market	32 days	20 days	+12 days
New Pending Sales	894	872	+2.5%
New Listings	901	979	-8.0%
Active Listings	1,928	1,726	+11.7%
Months of Supply	1.88	1.65	+0.23 mos.

Closed Sales

2026

2025

2024

2023

2022

751

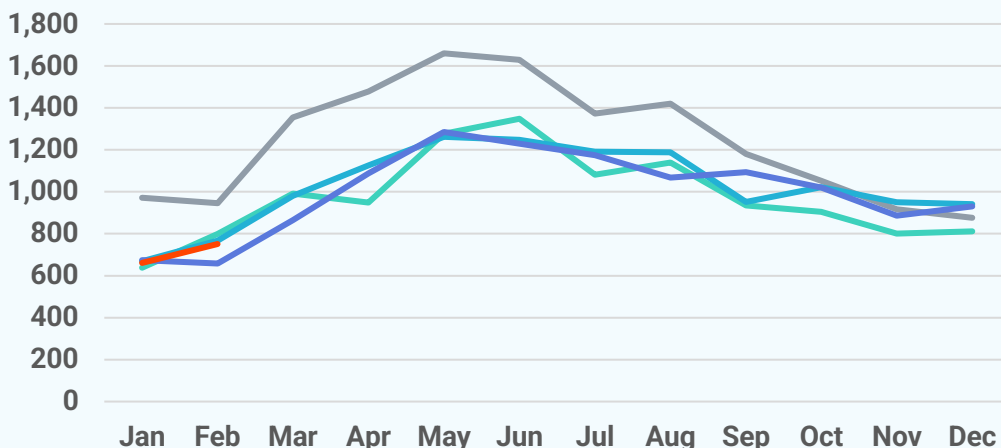
February 2026

+14.1%

Feb '26 vs. Feb '25
(Feb '25: 658)

+13.6%

Feb '26 vs. Jan '26
(Jan '26: 661)



Median Sold Price

2026 2025 2024 2023 2022

\$530,000

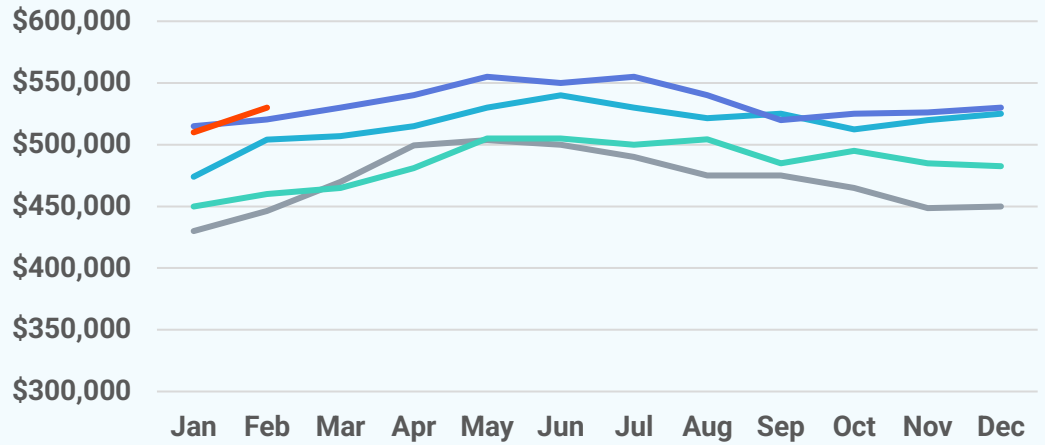
February 2026

+1.9%

Feb '26 vs. Feb '25
(Feb '25: \$520,300)

+3.9%

Feb '26 vs. Jan '26
(Jan '26: \$510,000)



Median Days on Market

2026 2025 2024 2023 2022

32 days

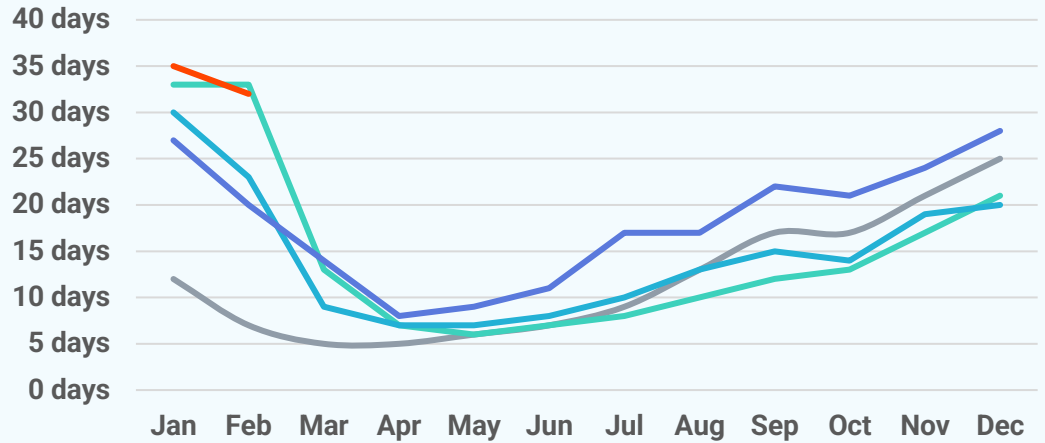
February 2026

+12 days

Feb '26 vs. Feb '25
(Feb '25: 20 days)

-3 days

Feb '26 vs. Jan '26
(Jan '26: 35 days)



New Pending Sales

2026 2025 2024 2023 2022

894

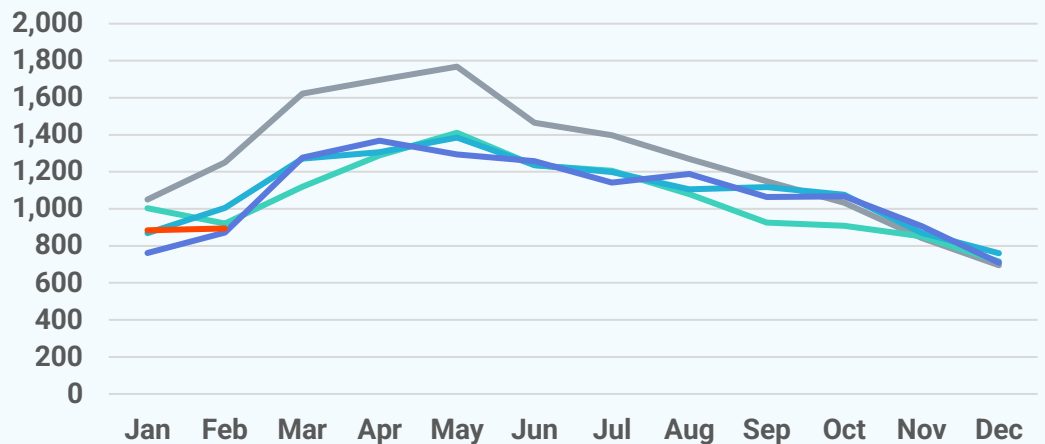
February 2026

+2.5%

Feb '26 vs. Feb '25
(Feb '25: 872)

+1.1%

Feb '26 vs. Jan '26
(Jan '26: 884)



New Listings

2026

2025

2024

2023

2022

901

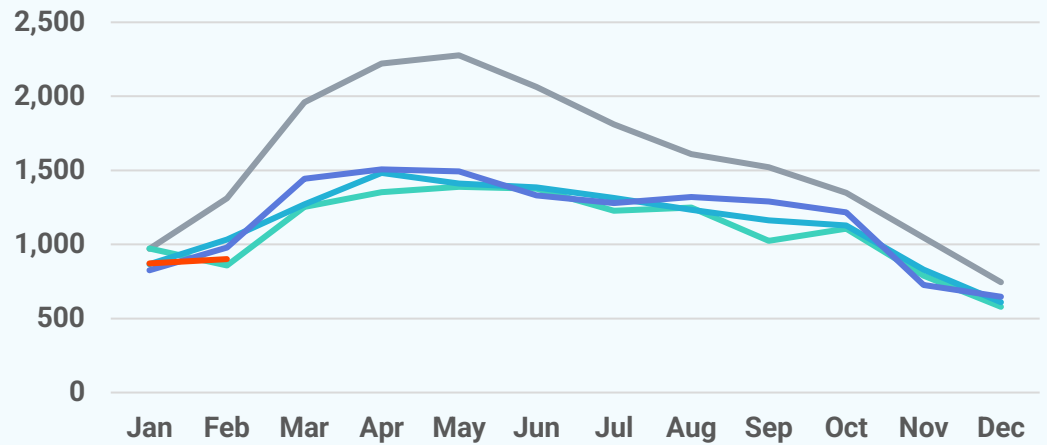
February 2026

-8.0%

Feb '26 vs. Feb '25
(Feb '25: 979)

+3.3%

Feb '26 vs. Jan '26
(Jan '26: 872)



Active Listings

2026

2025

2024

2023

2022

1,928

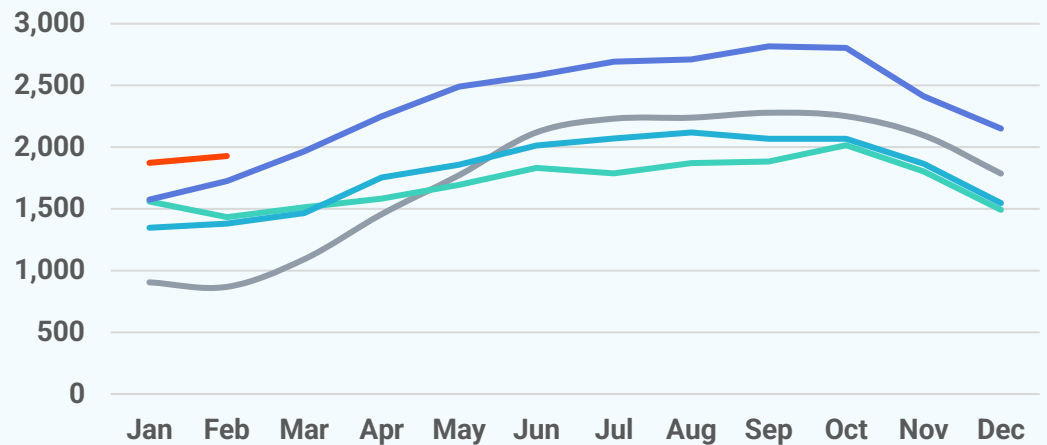
February 2026

+11.7%

Feb '26 vs. Feb '25
(Feb '25: 1,726)

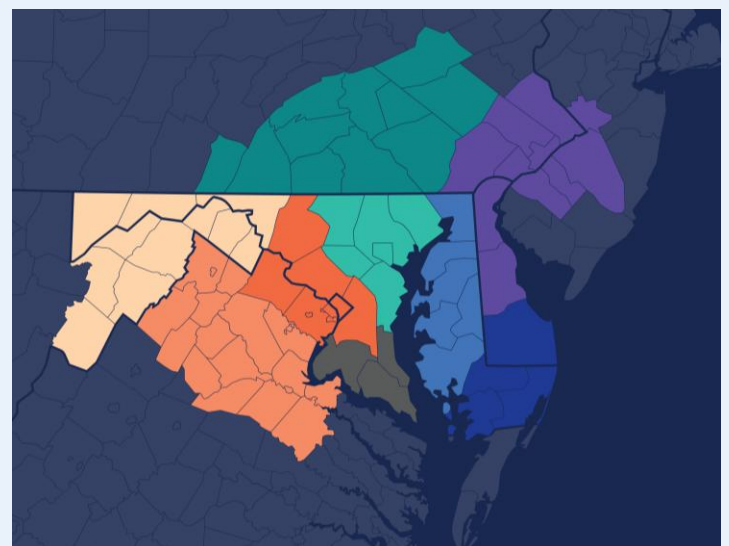
+2.9%

Feb '26 vs. Jan '26
(Jan '26: 1,873)



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February 2026 Attached/Townhomes Report

Prepared by Bright Research

Data as of March 5, 2026

Key Market Statistics	Feb 2026	Feb 2025	Change
Closed Sales	202	188	+7.4%
Median Sold Price	\$441,750	\$419,395	+5.3%
Median Days on Market	15 days	11 days	+4 days
New Pending Sales	284	208	+36.5%
New Listings	271	221	+22.6%
Active Listings	338	249	+35.7%
Months of Supply	1.27	0.93	+0.34 mos.

Closed Sales

2026

2025

2024

2023

2022

202

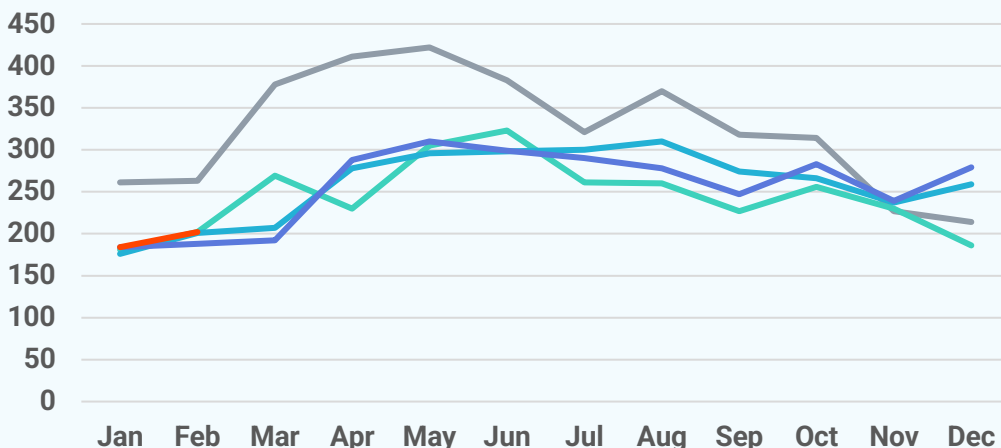
February 2026

+7.4%

Feb '26 vs. Feb '25
(Feb '25: 188)

+9.8%

Feb '26 vs. Jan '26
(Jan '26: 184)



Median Sold Price

2026 2025 2024 2023 2022

\$441,750

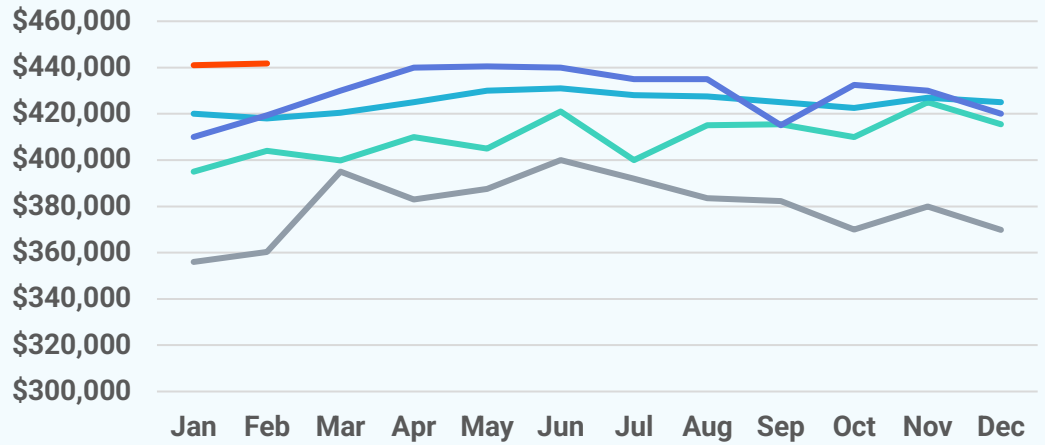
February 2026

+5.3%

Feb '26 vs. Feb '25
(Feb '25: \$419,395)

+0.2%

Feb '26 vs. Jan '26
(Jan '26: \$441,000)



Median Days on Market

2026 2025 2024 2023 2022

15 days

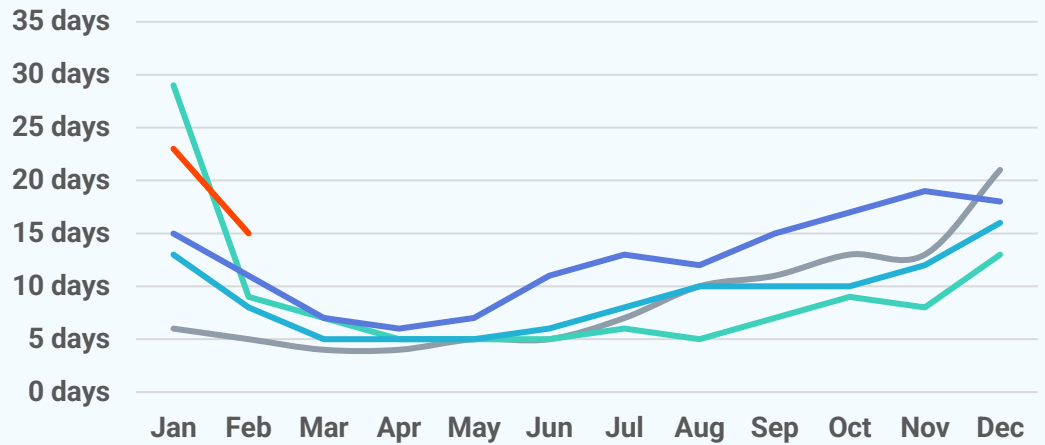
February 2026

+4 days

Feb '26 vs. Feb '25
(Feb '25: 11 days)

-8 days

Feb '26 vs. Jan '26
(Jan '26: 23 days)



New Pending Sales

2026 2025 2024 2023 2022

284

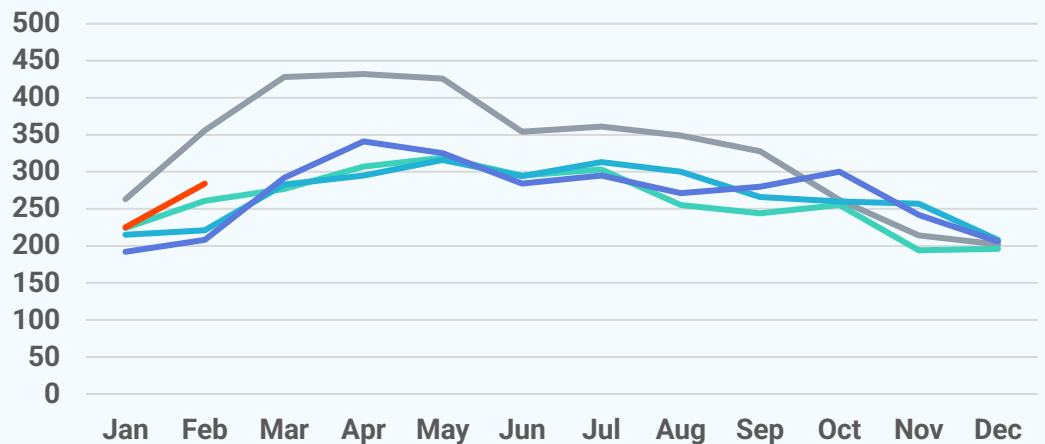
February 2026

+36.5%

Feb '26 vs. Feb '25
(Feb '25: 208)

+26.2%

Feb '26 vs. Jan '26
(Jan '26: 225)



New Listings

2026

2025

2024

2023

2022

271

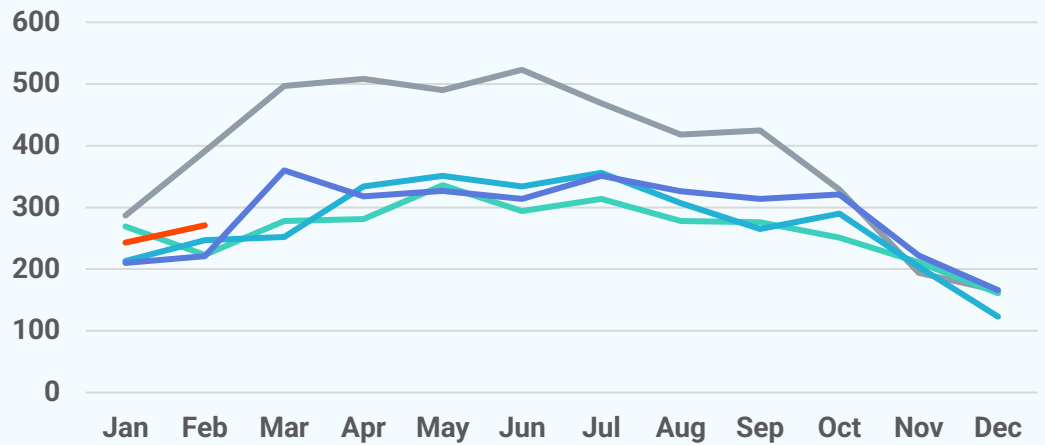
February 2026

+22.6%

Feb '26 vs. Feb '25
(Feb '25: 221)

+11.5%

Feb '26 vs. Jan '26
(Jan '26: 243)



Active Listings

2026

2025

2024

2023

2022

338

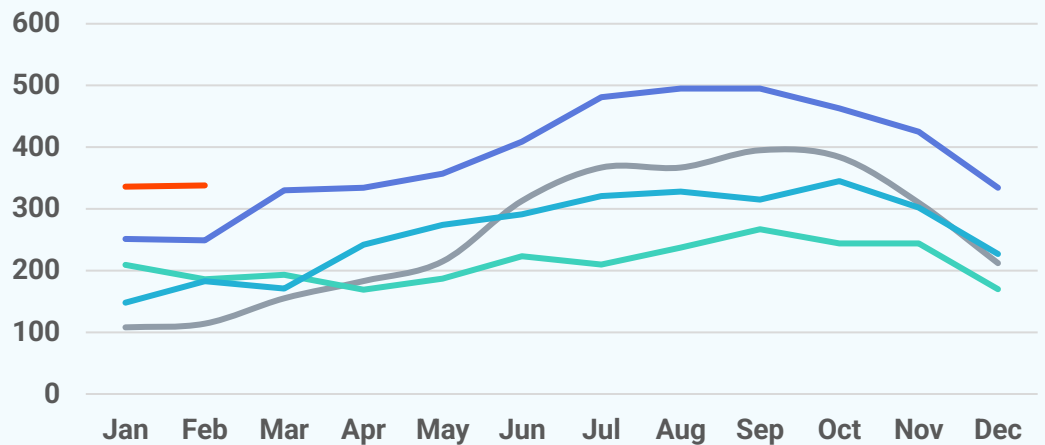
February 2026

+35.7%

Feb '26 vs. Feb '25
(Feb '25: 249)

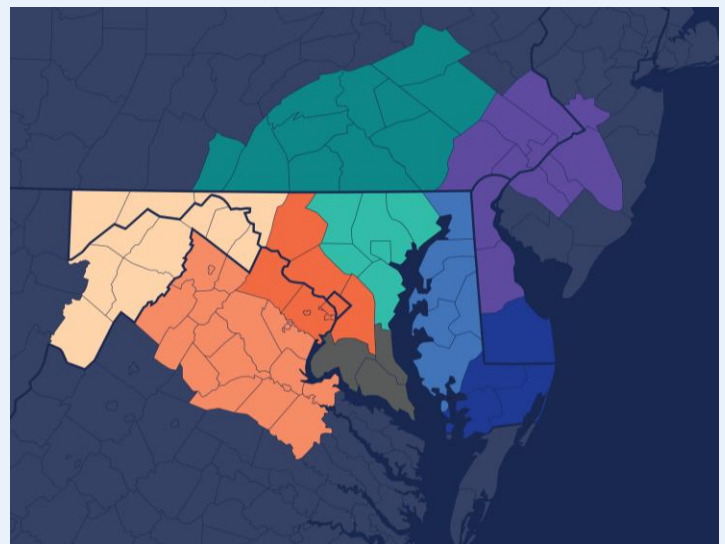
+0.6%

Feb '26 vs. Jan '26
(Jan '26: 336)



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February 2026 Condos Report

Prepared by Bright Research

Data as of March 5, 2026

Key Market Statistics	Feb 2026	Feb 2025	Change
Closed Sales	77	58	+32.8%
Median Sold Price	\$385,000	\$409,076	-5.9%
Median Days on Market	39 days	16 days	+23 days
New Pending Sales	121	72	+68.1%
New Listings	119	70	+70.0%
Active Listings	220	117	+88.0%
Months of Supply	2.47	1.33	+1.14 mos.

Closed Sales

2026

2025

2024

2023

2022

77

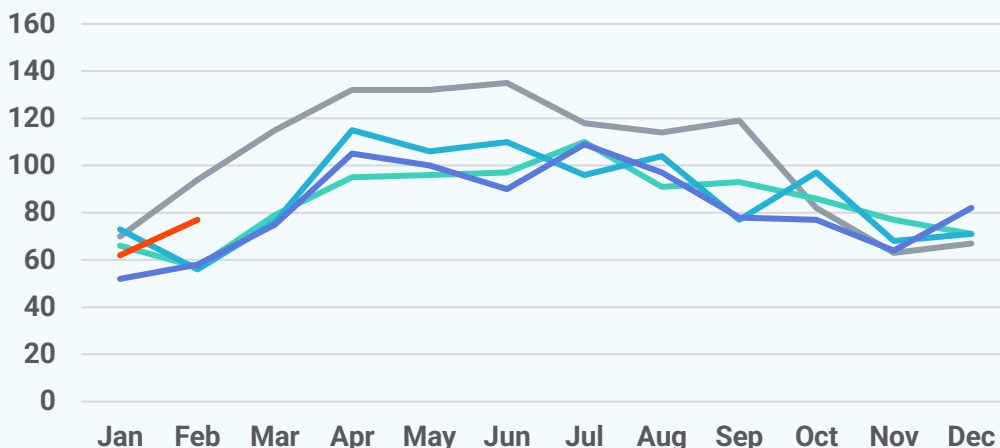
February 2026

+32.8%

Feb '26 vs. Feb '25
(Feb '25: 58)

+24.2%

Feb '26 vs. Jan '26
(Jan '26: 62)



Median Sold Price

2026 2025 2024 2023 2022

\$385,000

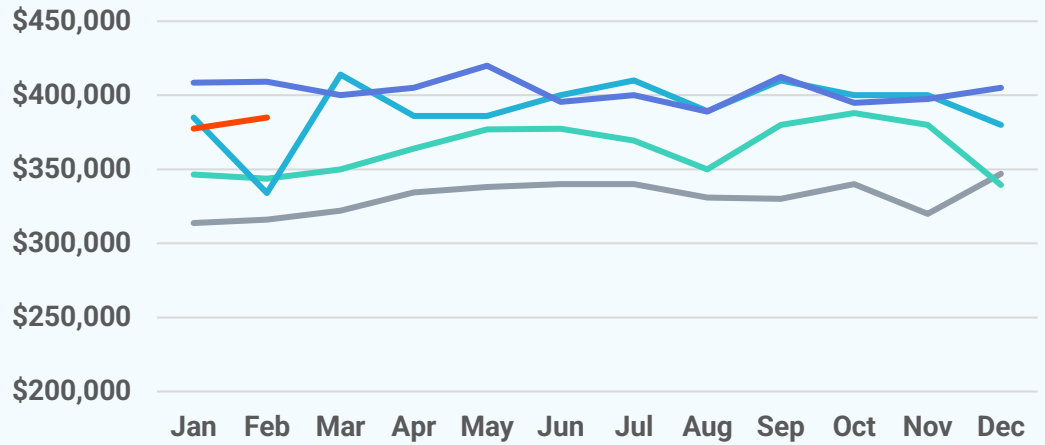
February 2026

-5.9%

Feb '26 vs. Feb '25
(Feb '25: \$409,076)

+2.0%

Feb '26 vs. Jan '26
(Jan '26: \$377,500)



Median Days on Market

2026 2025 2024 2023 2022

39 days

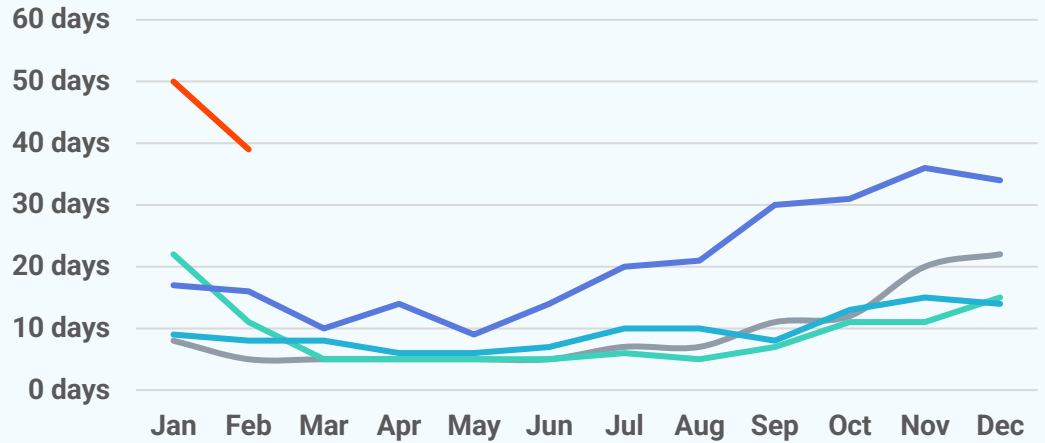
February 2026

+23 days

Feb '26 vs. Feb '25
(Feb '25: 16 days)

-11 days

Feb '26 vs. Jan '26
(Jan '26: 50 days)



New Pending Sales

2026 2025 2024 2023 2022

121

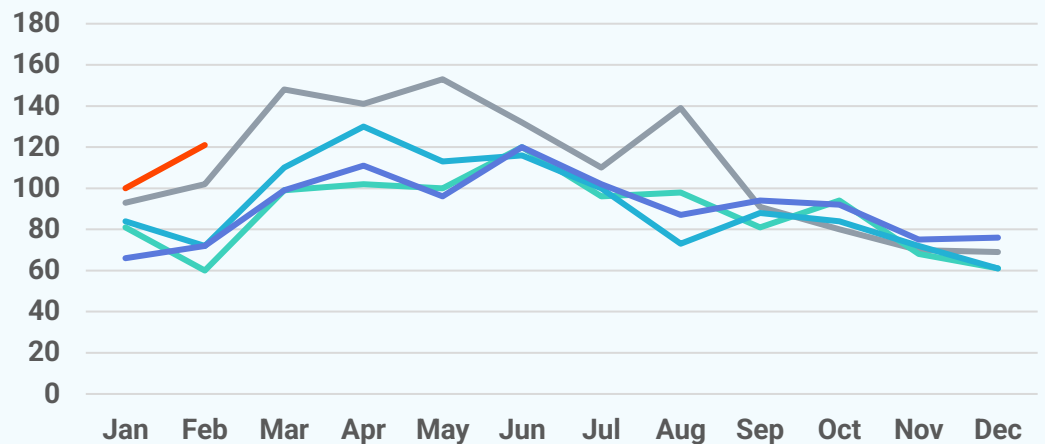
February 2026

+68.1%

Feb '26 vs. Feb '25
(Feb '25: 72)

+21.0%

Feb '26 vs. Jan '26
(Jan '26: 100)



New Listings

2026

2025

2024

2023

2022

119

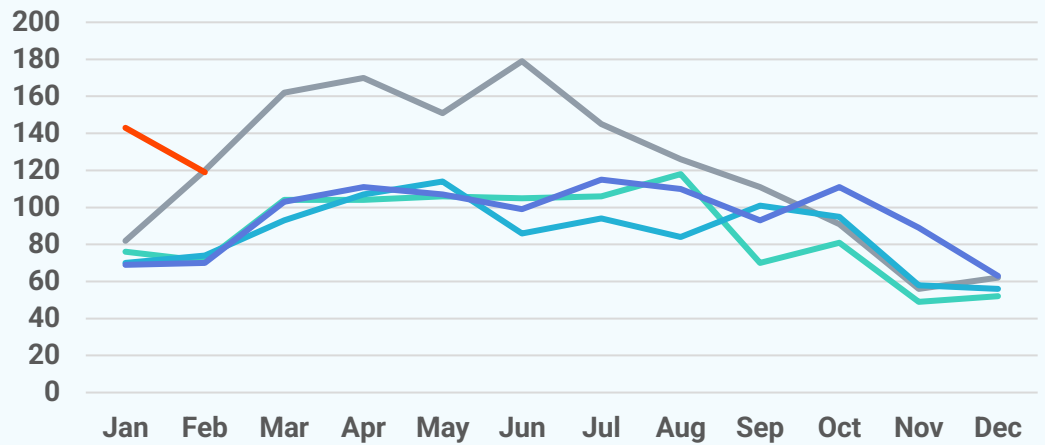
February 2026

+70.0%

Feb '26 vs. Feb '25
(Feb '25: 70)

-16.8%

Feb '26 vs. Jan '26
(Jan '26: 143)



Active Listings

2026

2025

2024

2023

2022

220

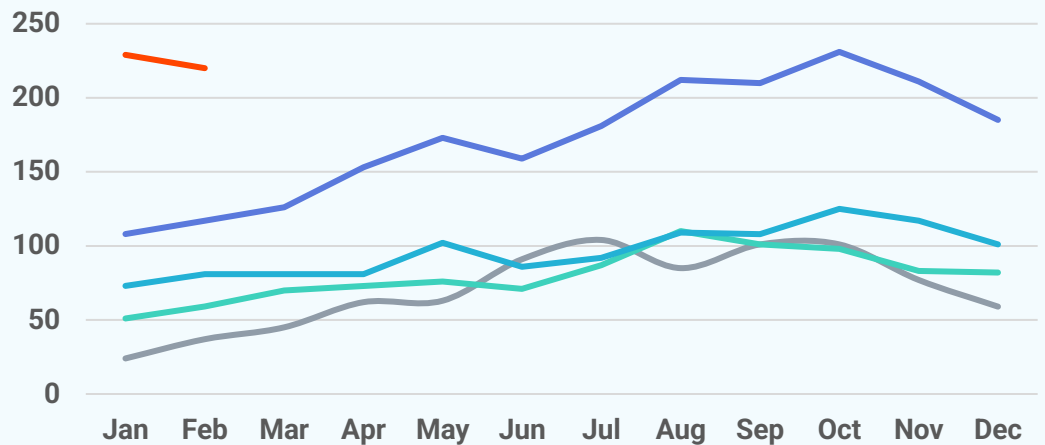
February 2026

+88.0%

Feb '26 vs. Feb '25
(Feb '25: 117)

-3.9%

Feb '26 vs. Jan '26
(Jan '26: 229)



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