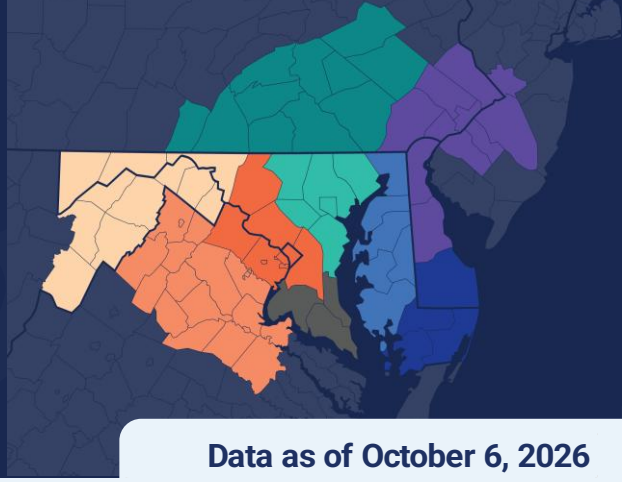
Mid-Atlantic Region

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	17,633	18,607	-5.2%	168,157	167,761	+0.2%
Median Sold Price	$425,000	$419,900	+1.2%	$435,000	$425,000	+2.4%
Median Days on Market	19 days	18 days	+1 day	15 days	13 days	+2 days
New Pending Sales	17,347	20,051	-13.5%	175,087	176,255	-0.7%
New Listings	24,086	23,986	+0.4%	244,611	238,957	+2.4%
Active Listings	57,397	48,442	+18.5%	57,397	48,442	+18.5%
Months of Supply	3.08	2.60	+0.48 mos.	3.08	2.60	+0.48 mos.
Showings	316,090	361,781	-12.6%	3,366,694	3,439,714	-2.1%

Housing Market Trends

A stalling fall market in the Mid-Atlantic region. As mortgage rates surpass 7% and buyers hit affordability ceilings, demand has cooled considerably. In September, there were 17,633 closed sales, which was down 5.2% compared to a year ago.

The outlook is for continued sluggish sales activity. New pending sales fell by 13.5%, the largest year-over-year decline since August 2023, when rates also escalated to above 7%. Showing activity was also down by 12.6% in September.

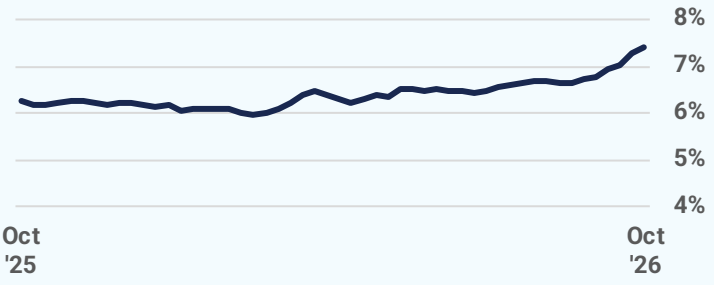
Home price growth has slowed in the region. The median sold price in September was $425,000 which was up 1.2%, the lowest year-over-year price gain since May 2023.

Sellers are hesitant, as well, though the number of new listings in September was slightly higher than a year ago. Overall, the active listings at the end of the month rose by 18.5% year-over-year, though inventory is still below pre-pandemic levels.

Market Outlook

Year-to-date sales are tracking slightly above last year, but the pending sales and showings trends suggest we will end 2026 with fewer transactions than 2025. Even with a significant pullback in demand, inventory remains low, so prices are unlikely to fall in most local markets across the Mid-Atlantic region.

Weekly Avg. Mortgage Rate 30-yr fixed rate



Source: Freddie Mac

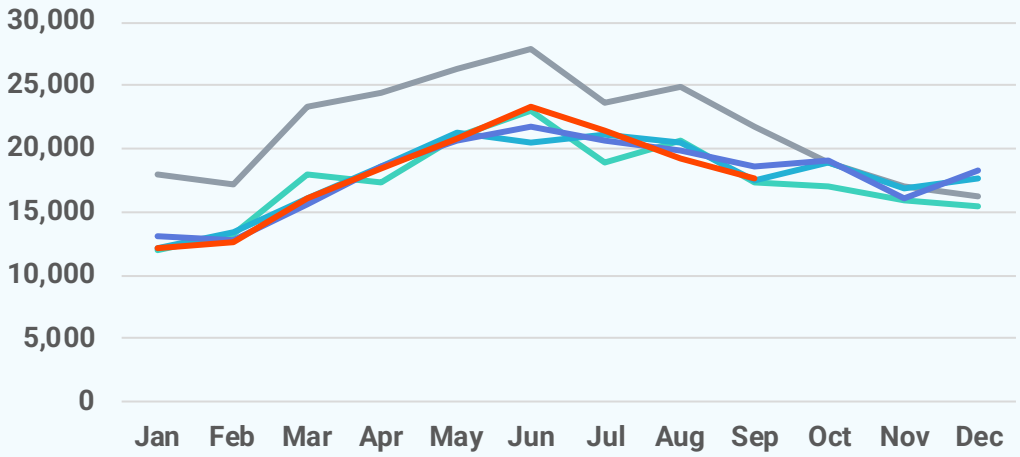
Closed Sales

2026 2025 2024 2023 2022

46,086
September 2026

-5.2%
Sep '26 vs. Sep '25
(Sep '25: 18,607)

-8.1%
Sep '26 vs. Aug '26
(Aug '26: 19,191)



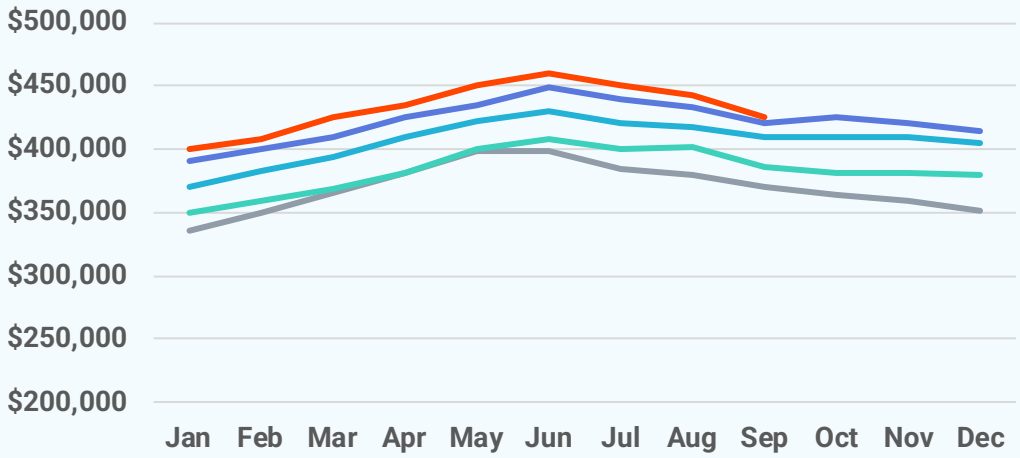
Median Sold Price

2026 2025 2024 2023 2022

$425,000
September 2026

+1.2%
Sep '26 vs. Sep '25
(Sep '25: $419,900)

-3.8%
Sep '26 vs. Aug '26
(Aug '26: $441,995)



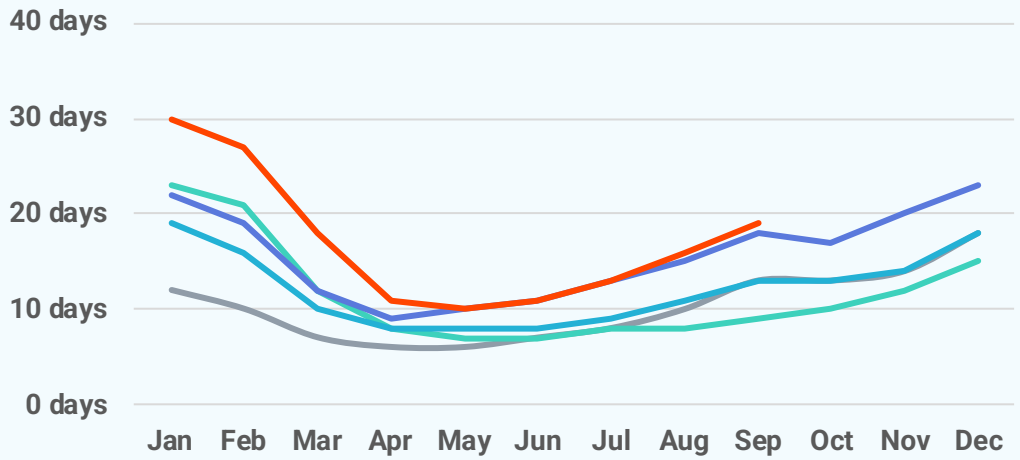
Median Days on Market

2026 2025 2024 2023 2022

19 days
September 2026

+1 day
Sep '26 vs. Sep '25
(Sep '25: 18 days)

+3 days
Sep '26 vs. Aug '26
(Aug '26: 16 days)



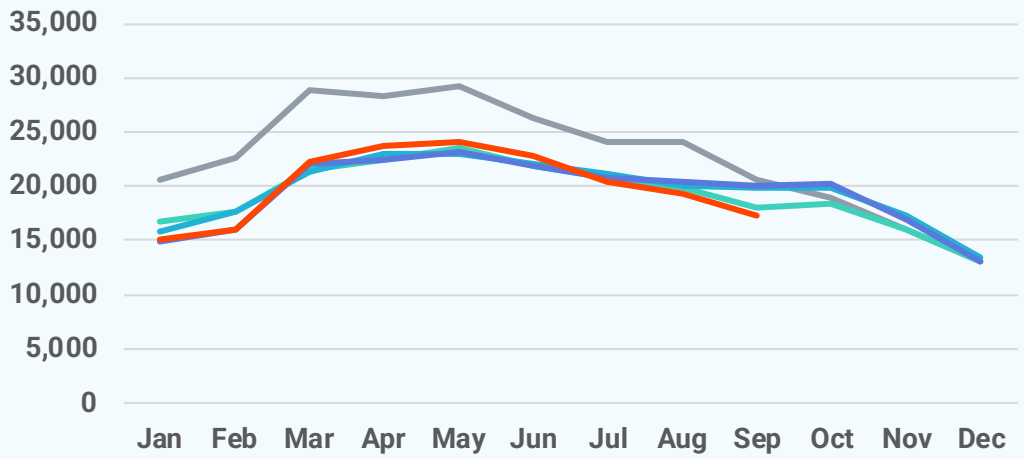
New Pending Sales

2026 2025 2024 2023 2022

17,347
September 2026

-13.5%
Sep '26 vs. Sep '25
(Sep '25: 20,051)

-9.9%
Sep '26 vs. Aug '26
(Aug '26: 19,245)



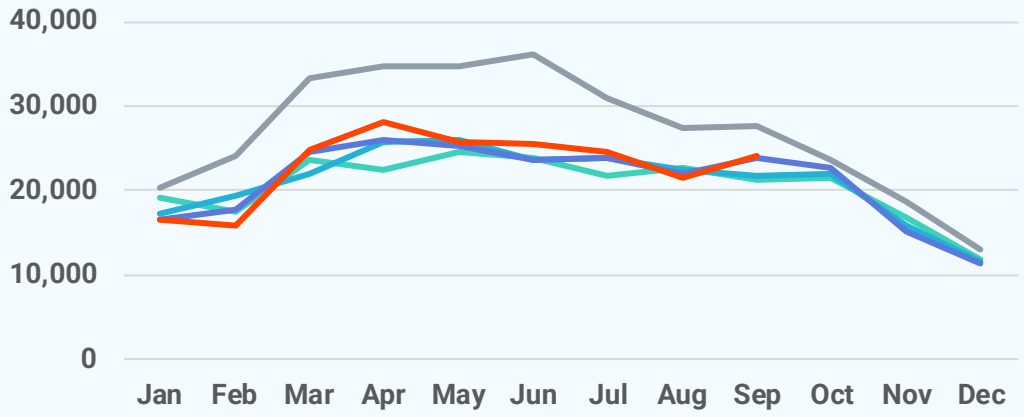
New Listings

2026 2025 2024 2023 2022

24,086
September 2026

+0.4%
Sep '26 vs. Sep '25
(Sep '25: 23,986)

+11.5%
Sep '26 vs. Aug '26
(Aug '26: 21,600)



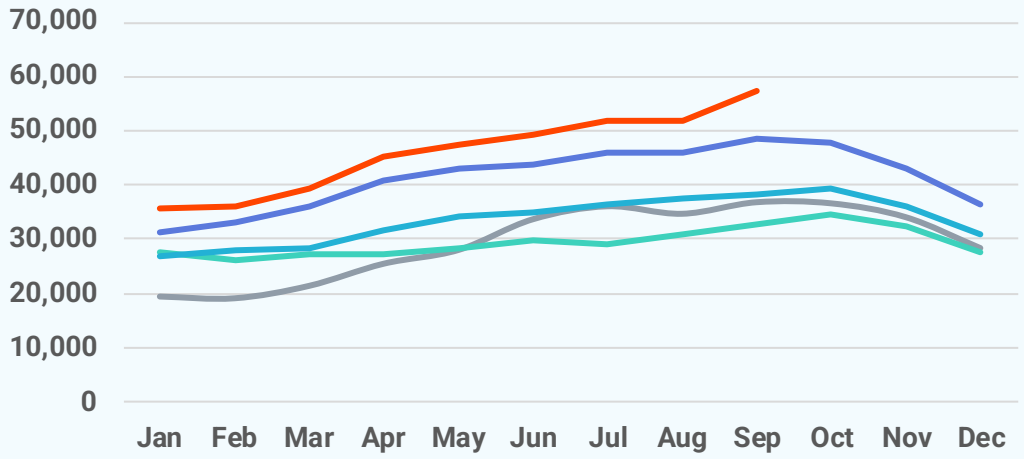
Active Listings

2026 2025 2024 2023 2022

57,397
September 2026

+18.5%
Sep '26 vs. Sep '25
(Sep '25: 48,442)

+11.0%
Sep '26 vs. Aug '26
(Aug '26: 51,726)



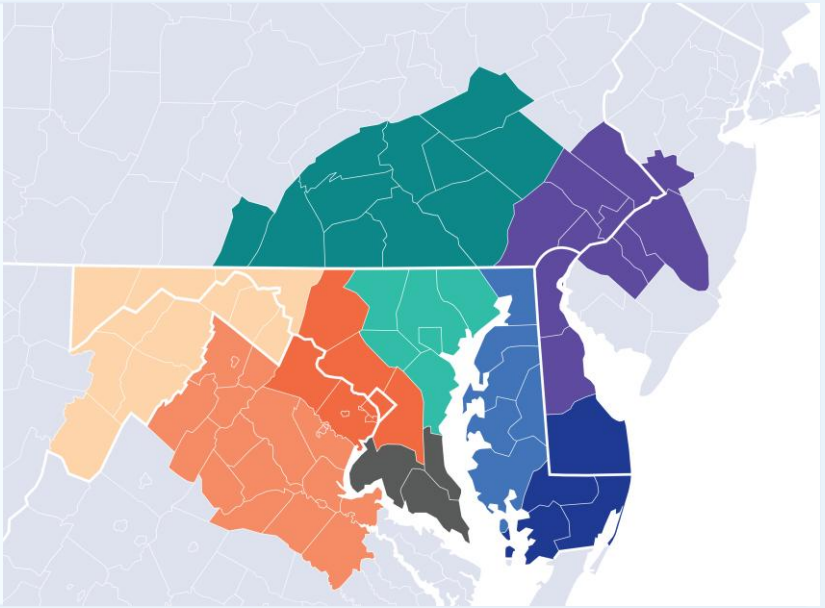
Local Markets	Closed Sales		Median Sales Price		Median Days on Market	
	Sep '26	vs. Sep '25	Sep '26	vs. Sep '25	Sep '26	vs. Sep '25
Mid-Atlantic	17,633	-5.2%	$425,000	+1.2%	19 days	+1 day
Philadelphia Metro	5,247	-2.9%	$400,000	+2.6%	16 days	+0 days
Baltimore Metro	2,400	-7.6%	$400,000	+0.0%	19 days	+3 days
Washington, D.C. Metro	3,565	-8.4%	$610,000	+1.6%	22 days	+1 day
Central Pennsylvania	2,418	+2.1%	$315,000	+5.0%	11 days	+1 day
MD/WV Panhandle	615	-4.2%	$326,250	+0.4%	24 days	-1 day
MD Eastern Shore	318	-14.1%	$384,950	-3.8%	31 days	+4 days
Del/Mar Coastal	754	-8.5%	$422,500	+3.0%	46 days	+7 days
Southern Maryland	376	-6.5%	$455,000	+1.0%	29 days	+10 days
North Central Virginia	1,307	-7.8%	$490,000	-2.0%	26 days	+5 days

Local Markets	New Pending Sales		New Listings		Showings	
	Sep '26	vs. Sep '25	Sep '26	vs. Sep '25	Sep '26	vs. Sep '25
Mid-Atlantic	17,347	-13.5%	24,086	+0.4%	316,090	-12.6%
Philadelphia Metro	5,159	-10.7%	7,236	+0.7%	104,499	-10.5%
Baltimore Metro	2,350	-14.9%	3,010	-1.5%	42,895	-12.5%
Washington, D.C. Metro	3,604	-17.1%	5,514	-0.3%	75,420	-16.9%
Central Pennsylvania	2,352	-7.2%	2,851	-1.6%	30,956	-12.6%
MD/WV Panhandle	579	-28.2%	862	+1.9%	8,481	-10.0%
MD Eastern Shore	304	-16.0%	400	+0.0%	3,970	-5.9%
Del/Mar Coastal	786	-4.4%	1,013	-0.5%	11,837	-4.2%
Southern Maryland	381	-21.0%	563	+4.6%	6,416	-6.3%
North Central Virginia	1,230	-14.5%	1,802	+6.1%	20,551	-12.2%

Local Markets	Active Listings		Months of Supply	
	Sep '26	vs. Sep '25	Sep '26	vs. Sep '25
Mid-Atlantic	57,397	+18.5%	3.08	+0.48 months
Philadelphia Metro	15,528	+19.6%	2.88	+0.49 months
Baltimore Metro	7,943	+21.2%	3.05	+0.58 months
Washington, D.C. Metro	13,203	+20.1%	3.22	+0.57 months
Central Pennsylvania	5,290	+13.4%	2.25	+0.18 months
MD/WV Panhandle	2,216	+8.2%	3.33	+0.13 months
MD Eastern Shore	1,362	+16.4%	4.47	+0.62 months
Del/Mar Coastal	3,815	+9.2%	5.01	+0.6 months
Southern Maryland	1,337	+24.4%	3.20	+0.53 months
North Central Virginia	4,580	+30.0%	3.23	+0.66 months

Local Market Map

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

Mid-Atlantic Region

September 2026 Detached Single-Family Home Report

Prepared by Bright Research

Data as of October 6, 2026

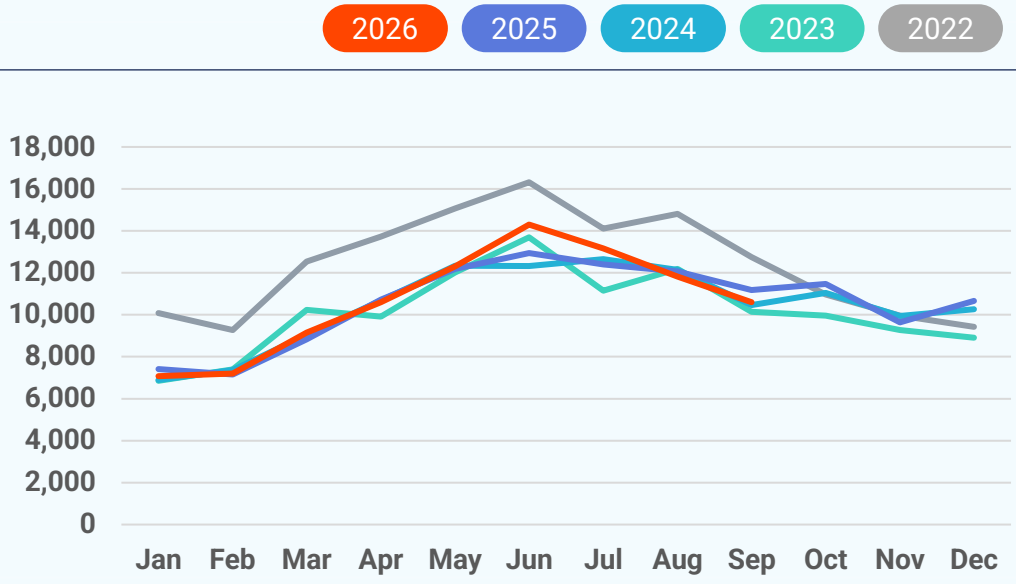
Key Market Statistics	Sep 2026	Sep 2025	Change
Closed Sales	10,606	11,174	-5.1%
Median Sold Price	$480,000	$470,000	+2.1%
Median Days on Market	17 days	17 days	+0 days
New Pending Sales	10,335	12,037	-14.1%
New Listings	13,402	13,477	-0.6%
Active Listings	30,864	26,937	+14.6%
Months of Supply	2.80	2.47	+0.33 mos.

Closed Sales

10,606
September 2026

-5.1%
Sep '26 vs. Sep '25
(Sep '25: 11,174)

-10.2%
Sep '26 vs. Aug '26
(Aug '26: 11,817)



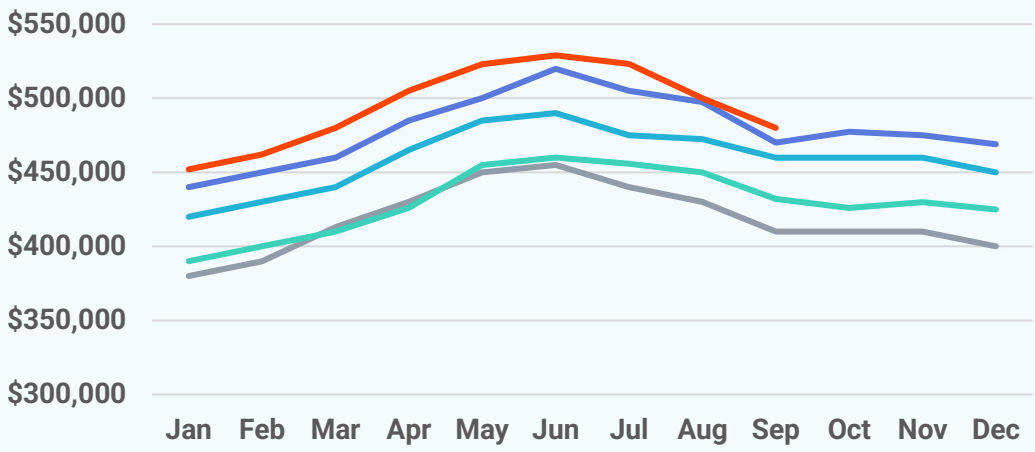
Median Sold Price

2026 2025 2024 2023 2022

$480,000
September 2026

+2.1%
Sep '26 vs. Sep '25
(Sep '25: $470,000)

-4.0%
Sep '26 vs. Aug '26
(Aug '26: $500,000)



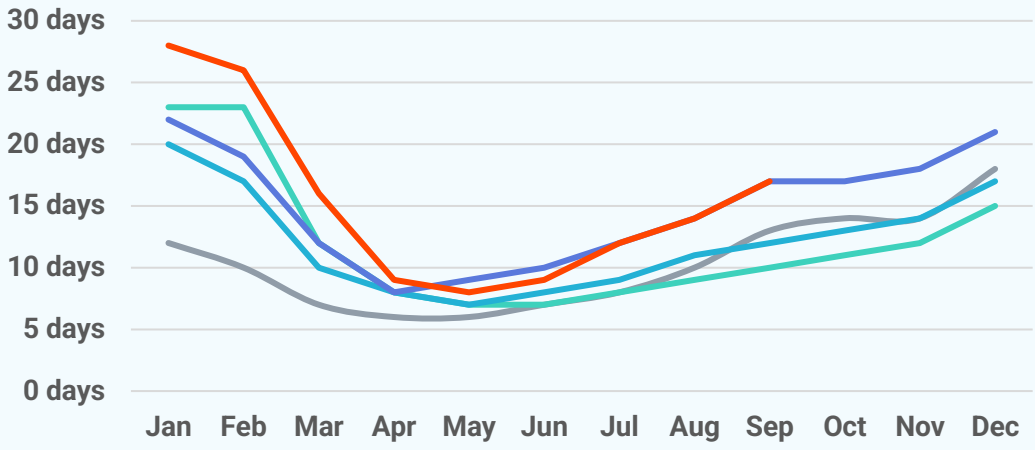
Median Days on Market

2026 2025 2024 2023 2022

17 days
September 2026

+0 days
Sep '26 vs. Sep '25
(Sep '25: 17 days)

+3 days
Sep '26 vs. Aug '26
(Aug '26: 14 days)



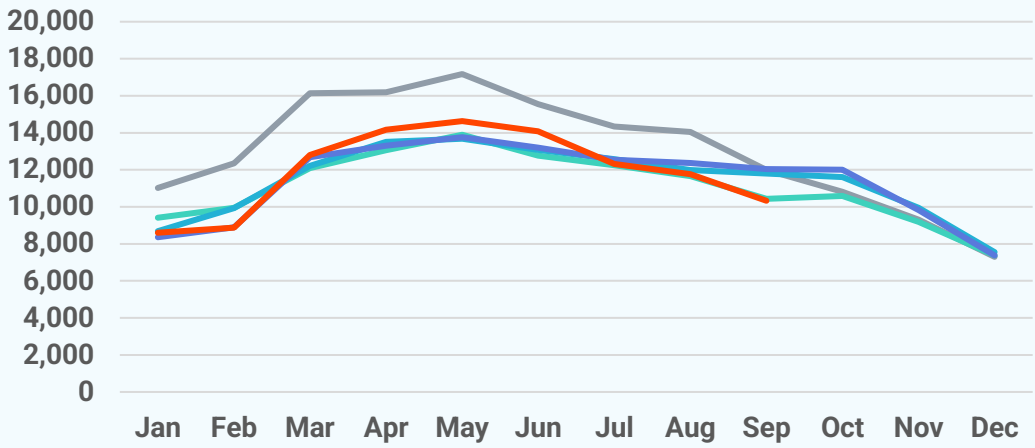
New Pending Sales

2026 2025 2024 2023 2022

10,335
September 2026

-14.1%
Sep '26 vs. Sep '25
(Sep '25: 12,037)

-12.1%
Sep '26 vs. Aug '26
(Aug '26: 11,761)



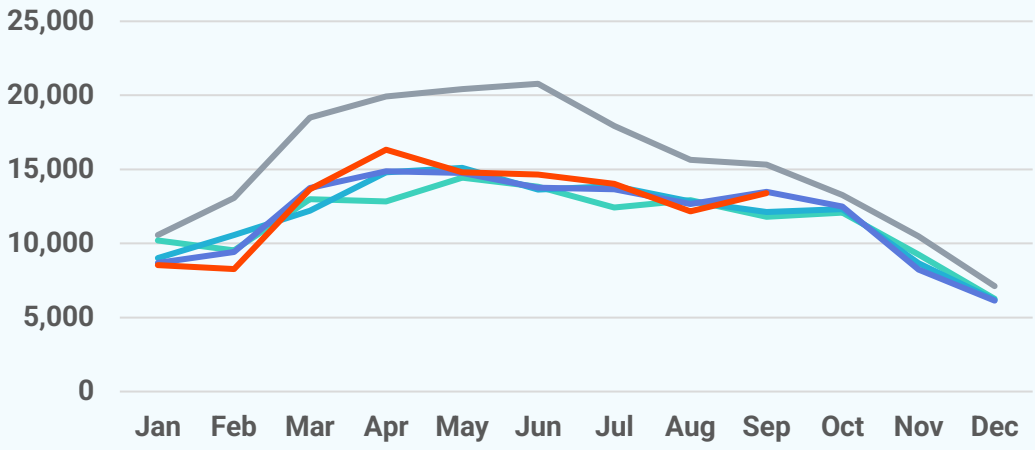
New Listings

2026 2025 2024 2023 2022

13,402
September 2026

-0.6%
Sep '26 vs. Sep '25
(Sep '25: 13,477)

+10.1%
Sep '26 vs. Aug '26
(Aug '26: 12,168)



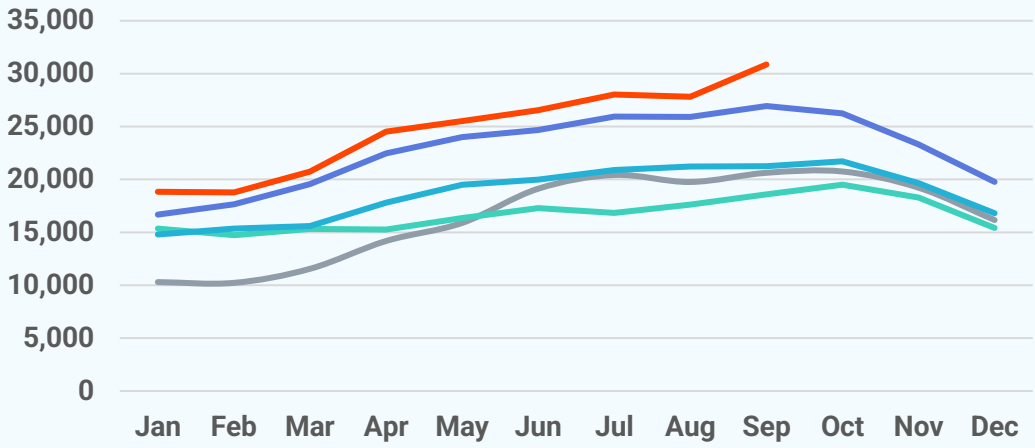
Active Listings

2026 2025 2024 2023 2022

30,864
September 2026

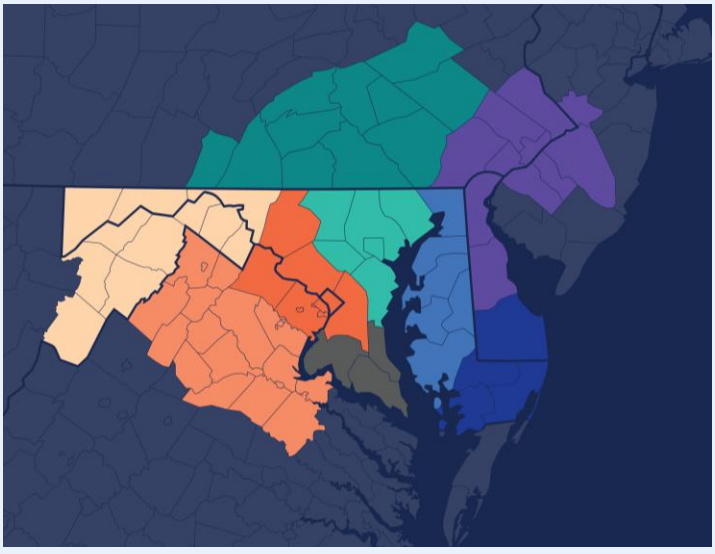
+14.6%
Sep '26 vs. Sep '25
(Sep '25: 26,937)

+11.0%
Sep '26 vs. Aug '26
(Aug '26: 27,816)



About Bright MLS

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Mid-Atlantic Region

September 2026 Attached/Townhomes Report

Prepared by Bright Research

Data as of October 6, 2026

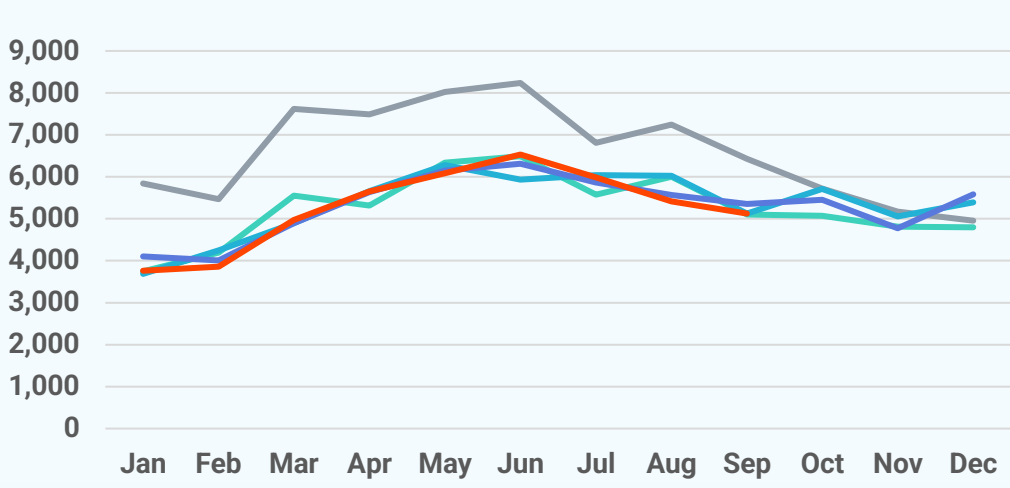
Key Market Statistics	Sep 2026	Sep 2025	Change
Closed Sales	5,124	5,355	-4.3%
Median Sold Price	$350,000	$340,000	+2.9%
Median Days on Market	20 days	18 days	+2 days
New Pending Sales	5,153	5,770	-10.7%
New Listings	7,609	7,434	+2.4%
Active Listings	17,816	14,473	+23.1%
Months of Supply	3.22	2.59	+0.63 mos.

Closed Sales

5,124
September 2026

-4.3%
Sep '26 vs. Sep '25
(Sep '25: 5,355)

-5.4%
Sep '26 vs. Aug '26
(Aug '26: 5,414)



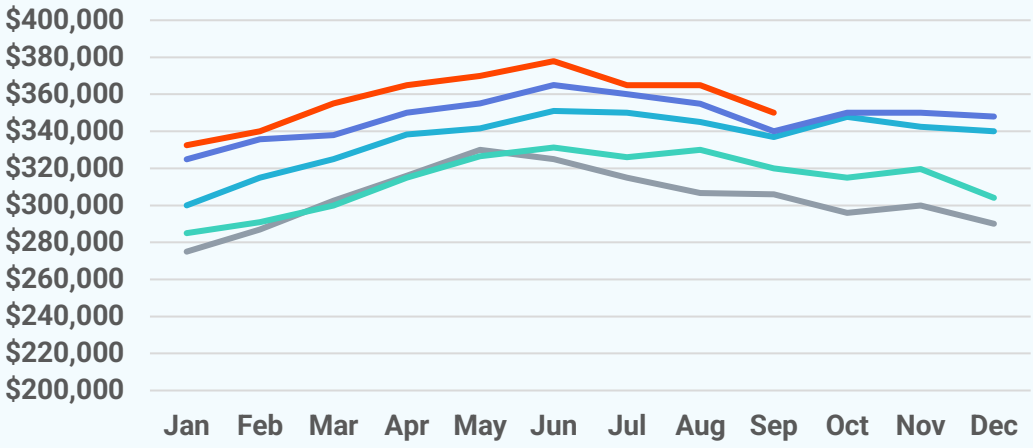
Median Sold Price

2026 2025 2024 2023 2022

$350,000
September 2026

+2.9%
Sep '26 vs. Sep '25
(Sep '25: $340,000)

-4.1%
Sep '26 vs. Aug '26
(Aug '26: $365,000)



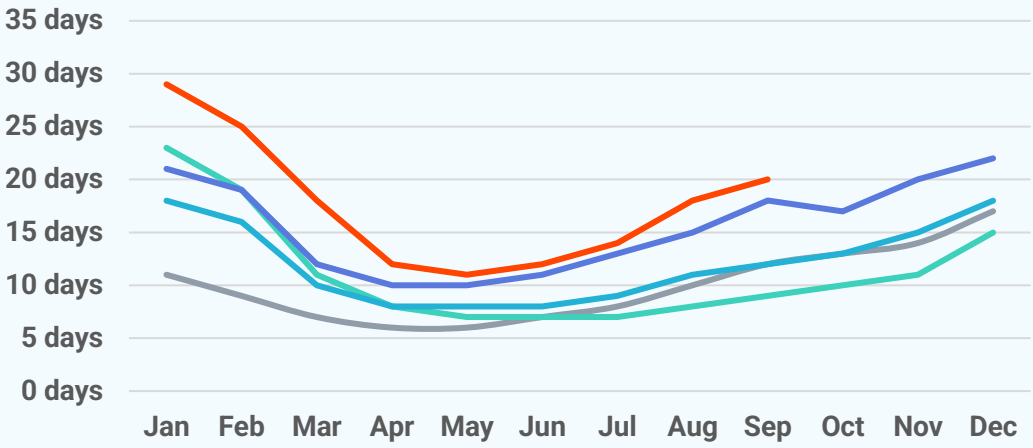
Median Days on Market

2026 2025 2024 2023 2022

20 days
September 2026

+2 days
Sep '26 vs. Sep '25
(Sep '25: 18 days)

+2 days
Sep '26 vs. Aug '26
(Aug '26: 18 days)



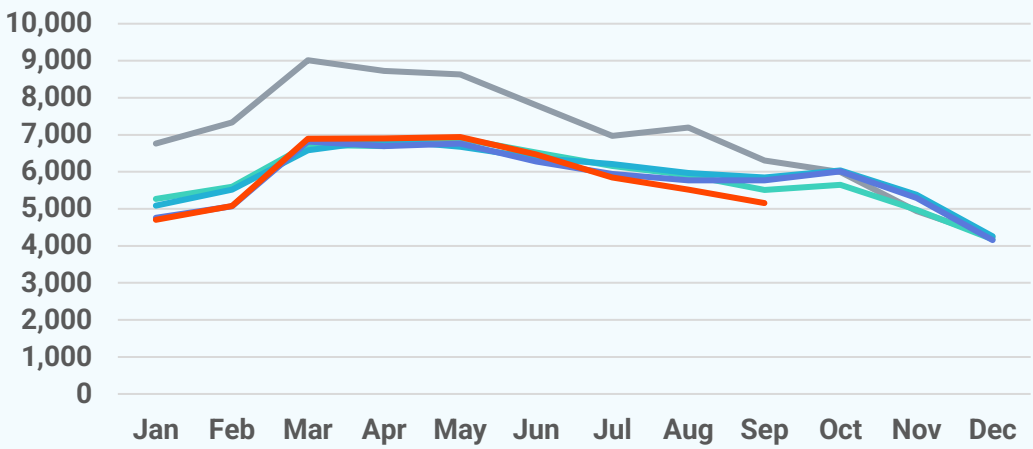
New Pending Sales

2026 2025 2024 2023 2022

5,153
September 2026

-10.7%
Sep '26 vs. Sep '25
(Sep '25: 5,770)

-6.6%
Sep '26 vs. Aug '26
(Aug '26: 5,520)



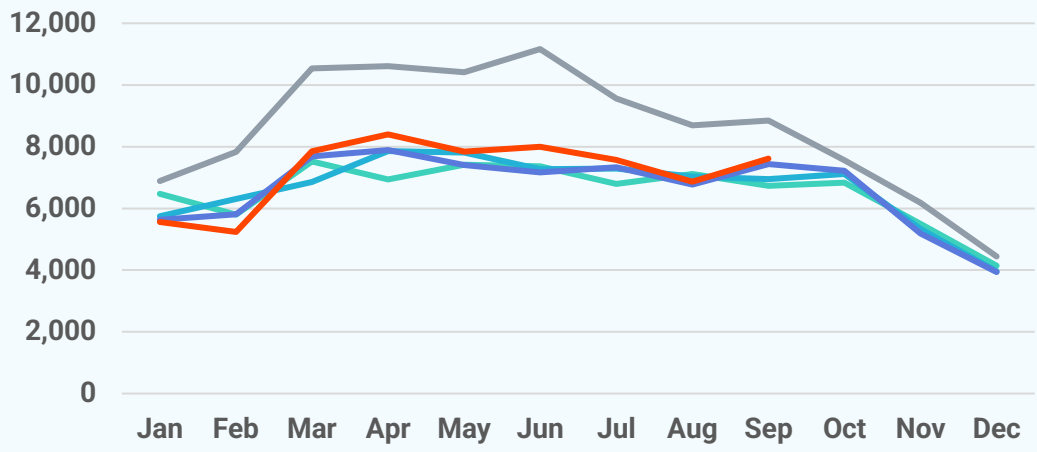
New Listings

2026 2025 2024 2023 2022

7,609
September 2026

+2.4%
Sep '26 vs. Sep '25
(Sep '25: 7,434)

+10.8%
Sep '26 vs. Aug '26
(Aug '26: 6,869)



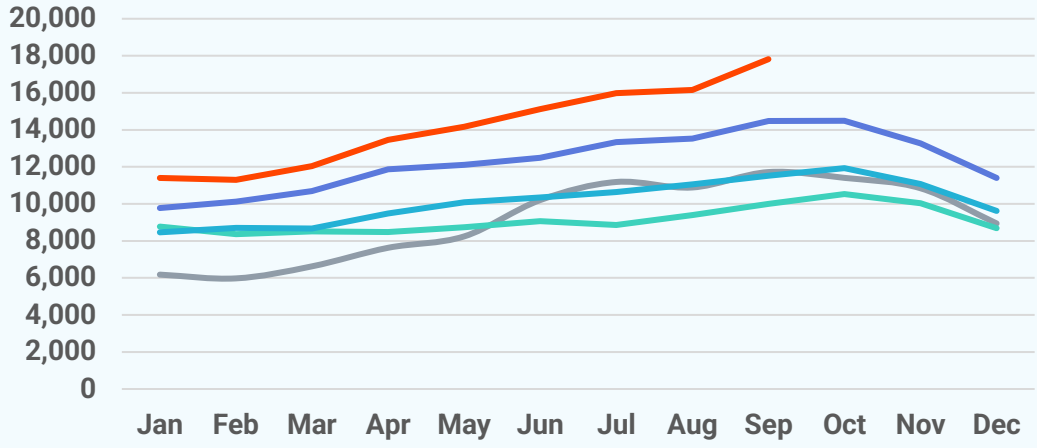
Active Listings

2026 2025 2024 2023 2022

17,816
September 2026

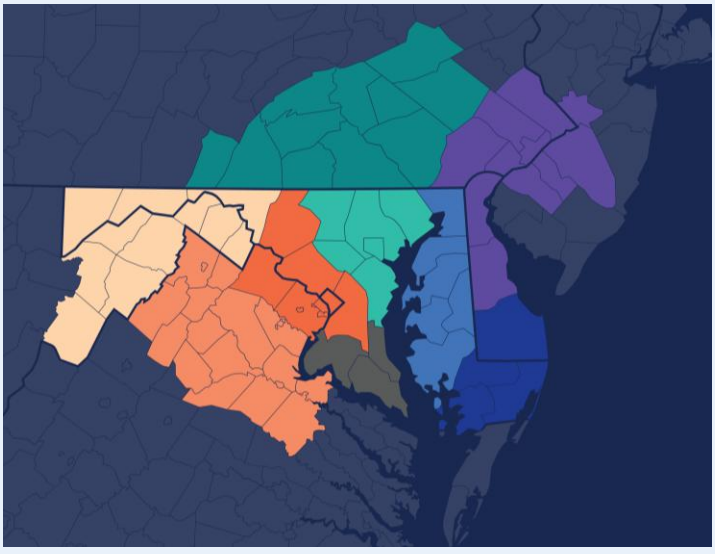
+23.1%
Sep '26 vs. Sep '25
(Sep '25: 14,473)

+10.2%
Sep '26 vs. Aug '26
(Aug '26: 16,160)



About Bright MLS

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Mid-Atlantic Region

September 2026 Condos Report

Prepared by Bright Research

Data as of October 6, 2026

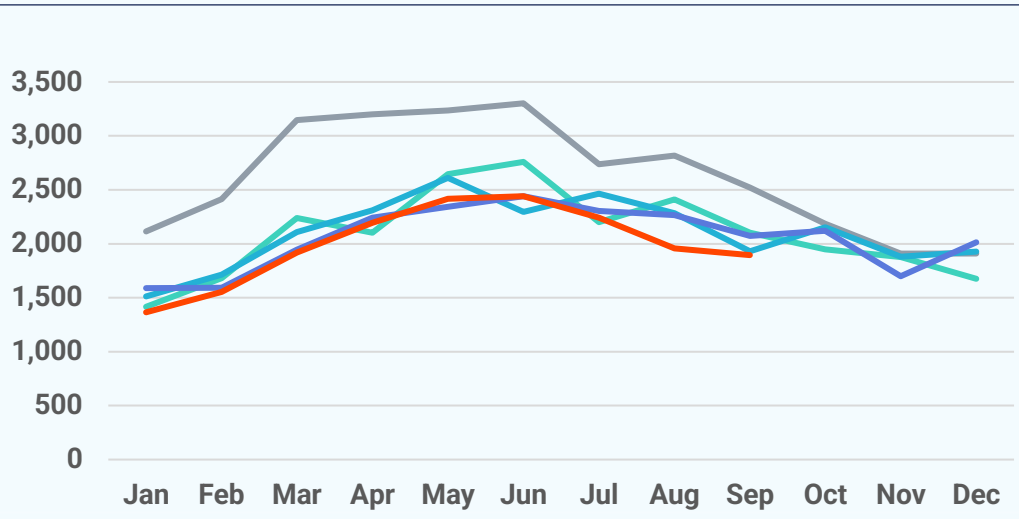
Key Market Statistics	Sep 2026	Sep 2025	Change
Closed Sales	1,896	2,073	-8.5%
Median Sold Price	$349,894	$350,000	-0.0%
Median Days on Market	32 days	27 days	+5 days
New Pending Sales	1,848	2,240	-17.5%
New Listings	3,065	3,069	-0.1%
Active Listings	8,717	7,032	+24.0%
Months of Supply	4.24	3.29	+0.95 mos.

Closed Sales

1,896
September 2026

-8.5%
Sep '26 vs. Sep '25
(Sep '25: 2,073)

-3.1%
Sep '26 vs. Aug '26
(Aug '26: 1,957)



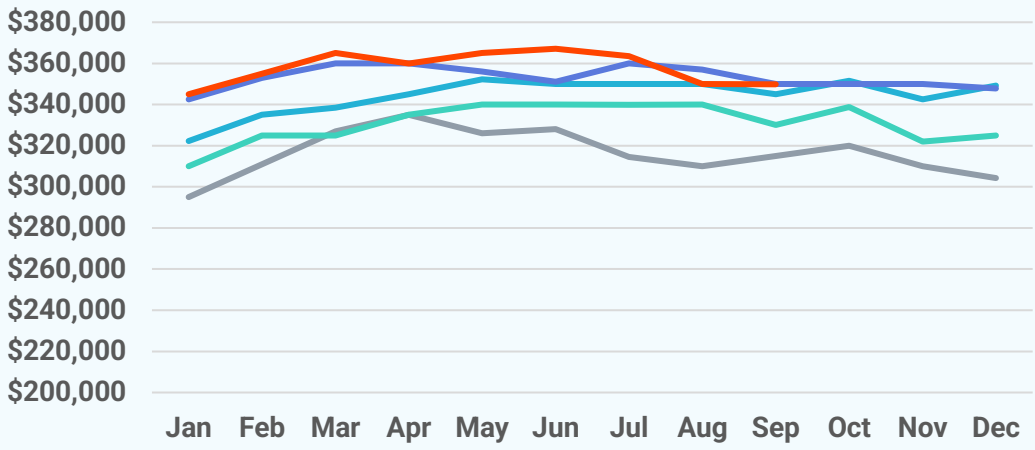
Median Sold Price

2026 2025 2024 2023 2022

$349,894
September 2026

-0.0%
Sep '26 vs. Sep '25
(Sep '25: $350,000)

-0.0%
Sep '26 vs. Aug '26
(Aug '26: $350,000)



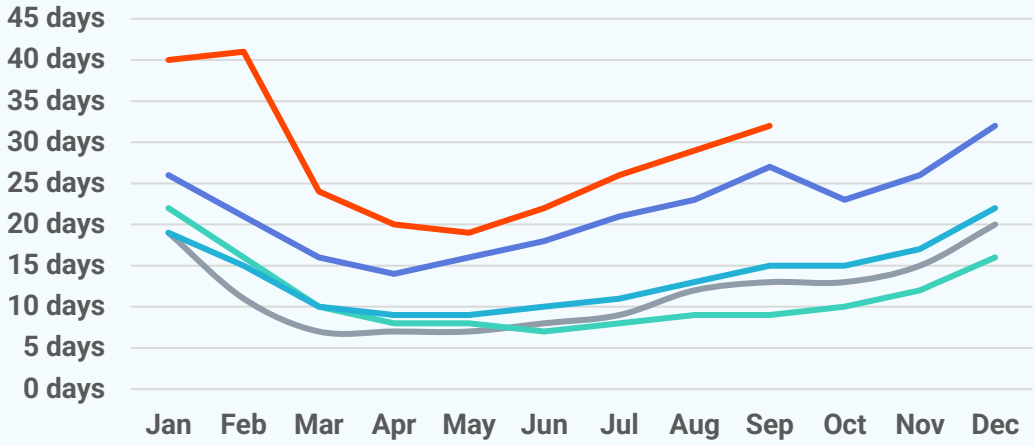
Median Days on Market

2026 2025 2024 2023 2022

32 days
September 2026

+5 days
Sep '26 vs. Sep '25
(Sep '25: 27 days)

+3 days
Sep '26 vs. Aug '26
(Aug '26: 29 days)



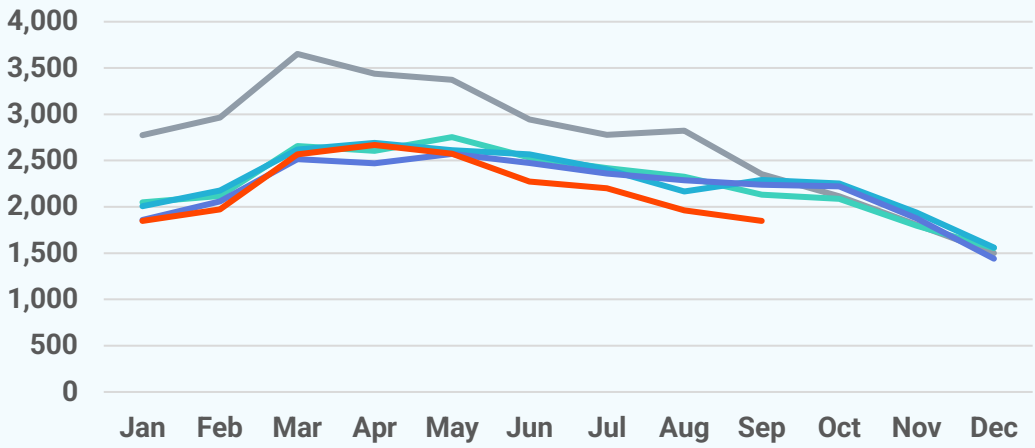
New Pending Sales

2026 2025 2024 2023 2022

1,848
September 2026

-17.5%
Sep '26 vs. Sep '25
(Sep '25: 2,240)

-5.8%
Sep '26 vs. Aug '26
(Aug '26: 1,961)



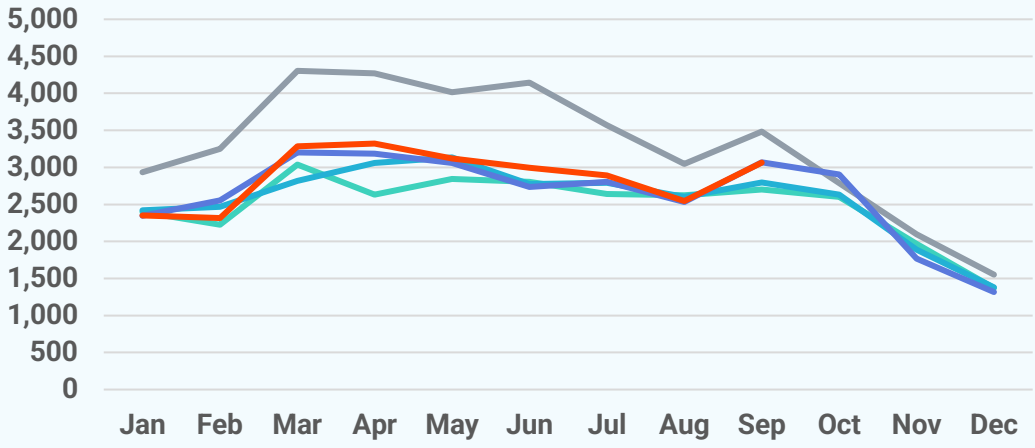
New Listings

2026 2025 2024 2023 2022

3,065
September 2026

-0.1%
Sep '26 vs. Sep '25
(Sep '25: 3,069)

+20.5%
Sep '26 vs. Aug '26
(Aug '26: 2,544)



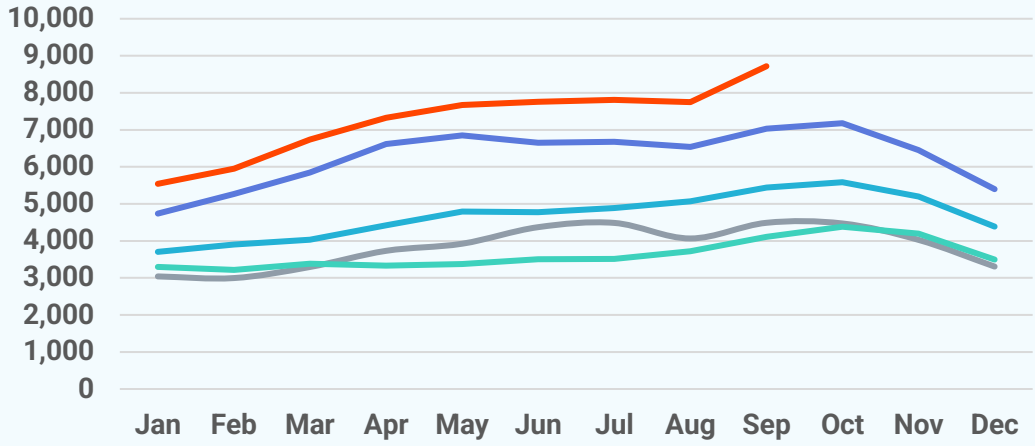
Active Listings

2026 2025 2024 2023 2022

8,717
September 2026

+24.0%
Sep '26 vs. Sep '25
(Sep '25: 7,032)

+12.5%
Sep '26 vs. Aug '26
(Aug '26: 7,750)



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**.

