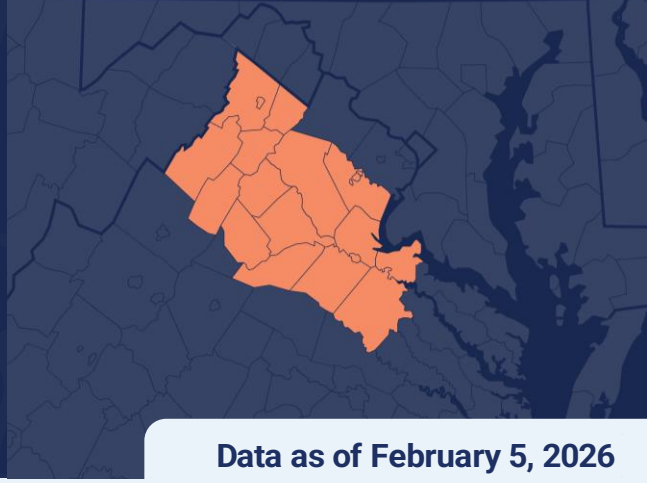
North Central Virginia

January 2026 Housing Market Report

Prepared by Bright Research



Data as of February 5, 2026

Key Market Statistics	Jan 2026	Jan 2025	Change	YTD 2026	YTD 2025	Change
Closed Sales	907	910	-0.3%	907	910	-0.3%
Median Sold Price	$480,000	$475,000	+1.1%	$480,000	$475,000	+1.1%
Median Days on Market	34 days	23 days	+11 days	34 days	23 days	+11 days
New Pending Sales	1,209	1,021	+18.4%	1,209	1,021	+18.4%
New Listings	1,259	1,105	+13.9%	1,259	1,105	+13.9%
Active Listings	2,438	1,934	+26.1%	2,438	1,934	+26.1%
Months of Supply	1.78	1.37	+0.41 mos.	1.78	1.37	+0.41 mos.
Showings	20,054	17,924	+11.9%	20,054	17,924	+11.9%

Housing Market Trends

Signs of a strong market ahead in the North Central Virginia region. January closed sales were essentially flat in the North Central Virginia region, down 0.3% year-over-year. However, new pending contracts jumped 18.4% compared with January 2025, suggesting more buyers are stepping back into the market as rates ease and inventory improves. Showings were up 11.9% year-over-year.

Even with the snowy weather in parts of the region, listing activity was strong, with the number of new listings up 13.9% year-over-year. There were 2,438 homes available for sale at the end of the month, a 26.1% increase from a year ago.

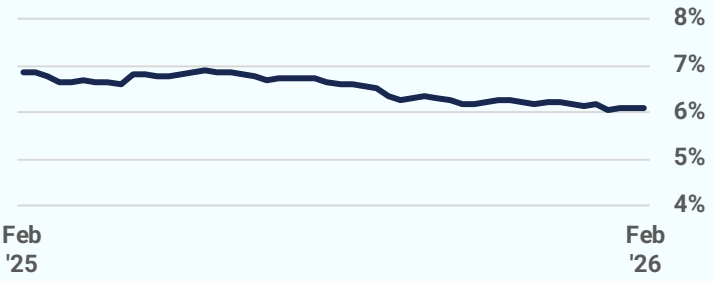
With more inventory coming onto the market, price growth has eased. The median price rose just 1.1% to $480,000 in January.

Homes are staying on the market longer. The median days on market reached 34 in January, 11 days slower than a year earlier.

Market Outlook

If mortgage rates continue to drift lower, the combination of stronger new pendings, double-digit listing growth, and higher showing activity in January points to a busy early spring market in the North Central Virginia region. Prices should continue to rise, albeit at a slower pace. Local economic uncertainty could be a headwind to the spring market, but it is too soon to tell.

Weekly Avg. Mortgage Rate 30-yr fixed rate



Source: Freddie Mac

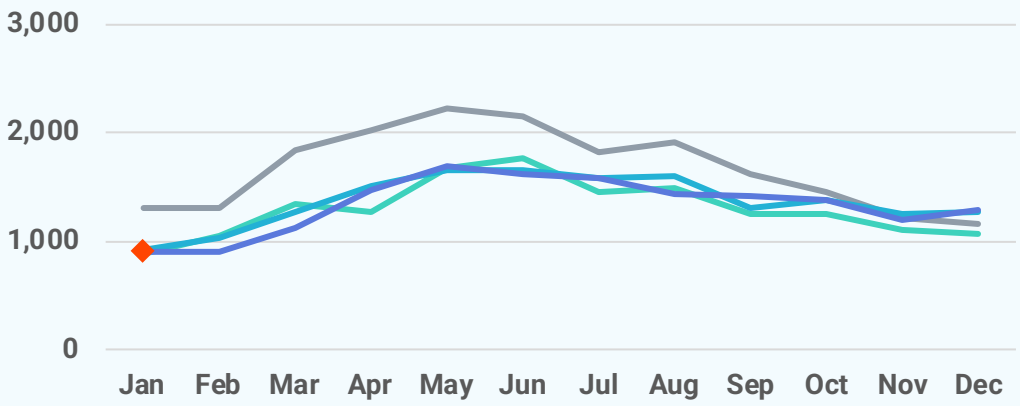
Closed Sales

2026 2025 2024 2023 2022

907
January 2026

-0.3%
Jan '26 vs. Jan '25
(Jan '25: 910)

-29.7%
Jan '26 vs. Dec '25
(Dec '25: 1,291)



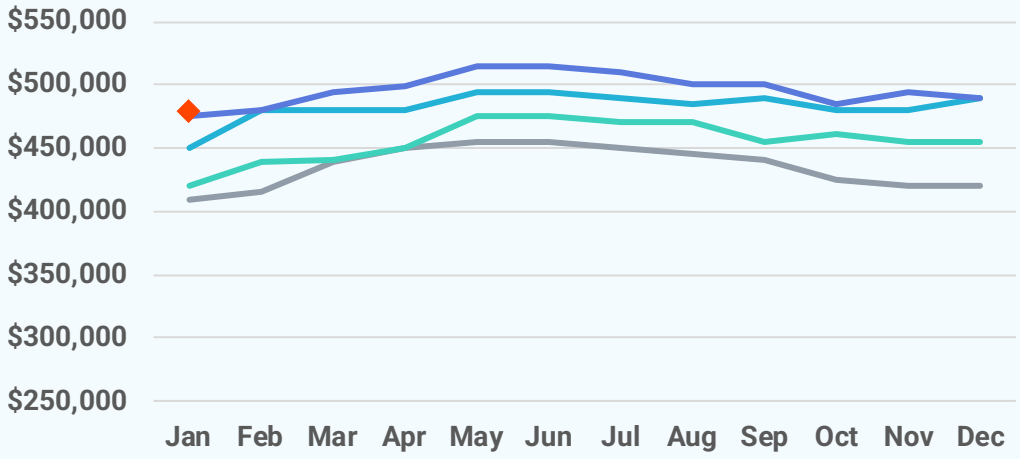
Median Sold Price

2026 2025 2024 2023 2022

$480,000
January 2026

+1.1%
Jan '26 vs. Jan '25
(Jan '25: $475,000)

-2.0%
Jan '26 vs. Dec '25
(Dec '25: $489,950)



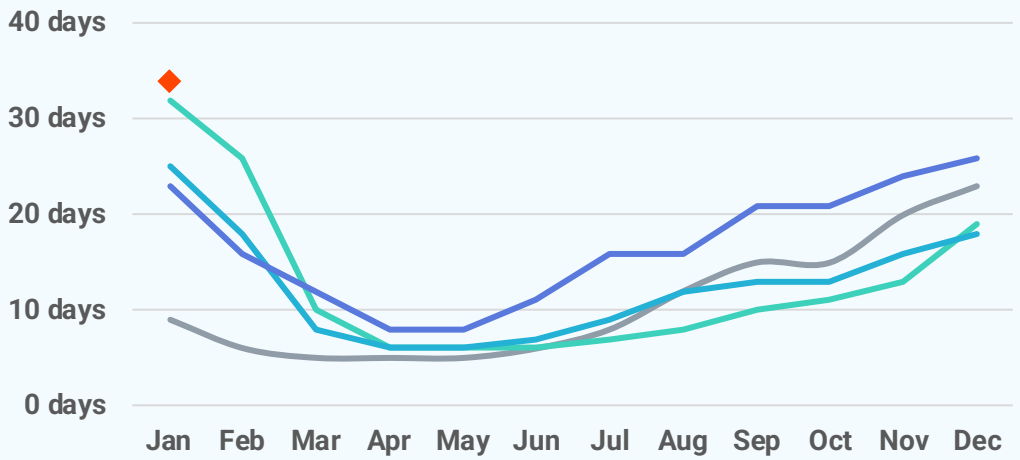
Median Days on Market

2026 2025 2024 2023 2022

34 days
January 2026

+11 days
Jan '26 vs. Jan '25
(Jan '25: 23 days)

+8 days
Jan '26 vs. Dec '25
(Dec '25: 26 days)



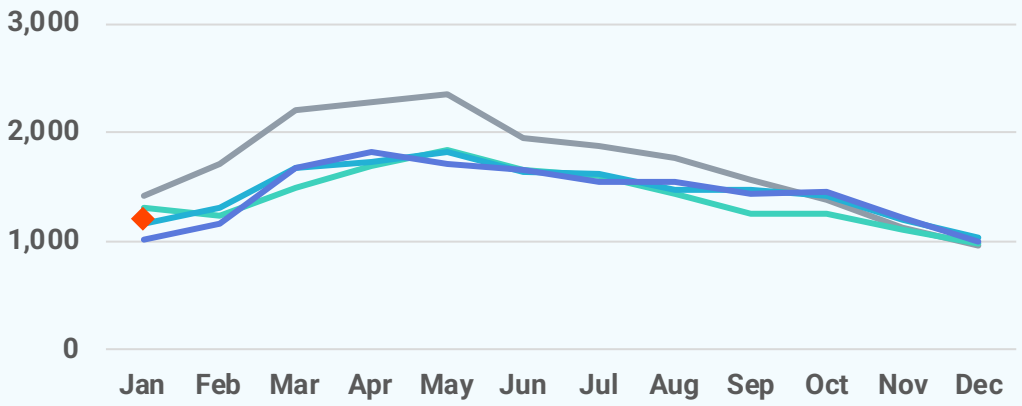
New Pending Sales

2026 2025 2024 2023 2022

1,209
January 2026

+18.4%
Jan '26 vs. Jan '25
(Jan '25: 1,021)

+22.0%
Jan '26 vs. Dec '25
(Dec '25: 991)



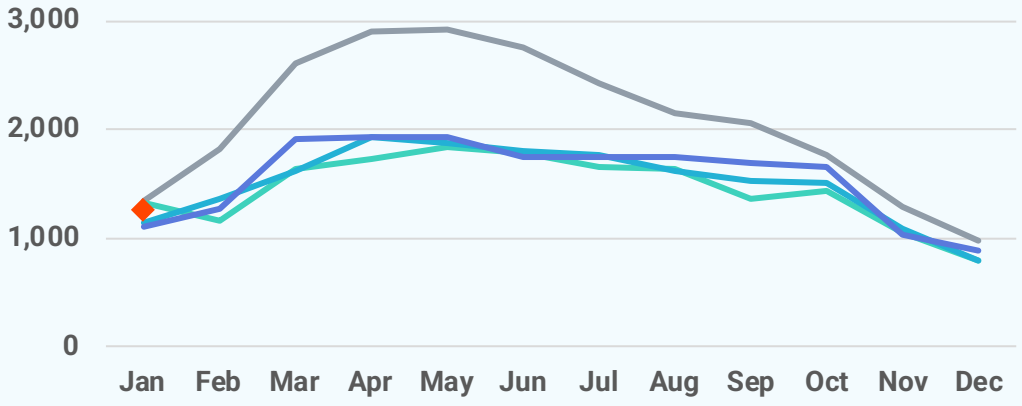
New Listings

2026 2025 2024 2023 2022

1,259
January 2026

+13.9%
Jan '26 vs. Jan '25
(Jan '25: 1,105)

+43.7%
Jan '26 vs. Dec '25
(Dec '25: 876)



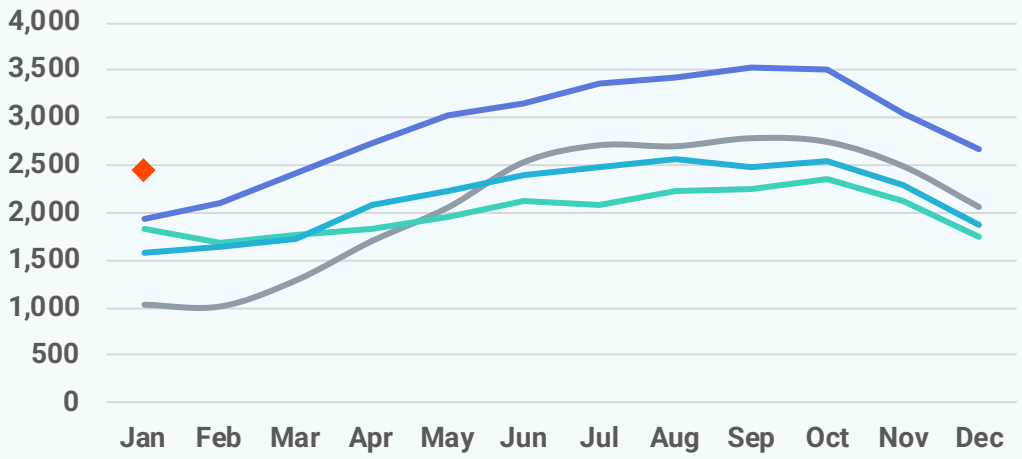
Active Listings

2026 2025 2024 2023 2022

2,438
January 2026

+26.1%
Jan '26 vs. Jan '25
(Jan '25: 1,934)

-8.7%
Jan '26 vs. Dec '25
(Dec '25: 2,669)



Local Markets	Closed Sales		Median Sales Price		Median Days on Market	
	Jan '26	vs. Jan '25	Jan '26	vs. Jan '25	Jan '26	vs. Jan '25
North Central VA	907	-0.3%	$480,000	+1.1%	34 days	+11 days
Caroline County, VA	22	-18.5%	$387,450	+2.0%	43 days	+14 days
Clarke County, VA	10	+11.1%	$660,000	+0.8%	23 days	+9 days
Culpeper County, VA	25	-30.6%	$499,900	+0.2%	46 days	+10 days
Fauquier County, VA	46	-22.0%	$610,000	-17.6%	20 days	-7 days
Frederick County, VA	81	+3.8%	$410,000	-6.8%	52 days	+27 days
Fredericksburg City, VA	13	+0.0%	$355,000	-30.4%	23 days	-8 days
King George County, VA	23	+9.5%	$482,000	-7.3%	31 days	+3 days
Madison County, VA	7	-12.5%	$380,000	-1.5%	59 days	+11 days
Manassas City, VA	22	-8.3%	$402,500	-8.0%	27 days	+18 days
Manassas Park City, VA	11	+0.0%	$485,000	+10.2%	48 days	+37 days
Orange County, VA	49	+14.0%	$389,990	-2.5%	49 days	+13 days
Page County, VA	11	-38.9%	$269,000	-7.6%	20 days	-17 days
Prince William County, VA	285	+17.8%	$560,000	+5.7%	28 days	+14 days
Rappahannock County, VA	5	-16.7%	$405,000	-43.0%	47 days	-6 days
Shenandoah County, VA	43	+13.2%	$309,000	-4.2%	31 days	-3 days
Spotsylvania County, VA	93	-18.4%	$455,000	+3.8%	37 days	+8 days
Stafford County, VA	109	+7.9%	$550,000	+4.0%	32 days	+9 days
Warren County, VA	38	-2.6%	$378,700	-0.3%	40 days	+8 days
Winchester City, VA	14	-39.1%	$385,625	-1.1%	25 days	+7 days

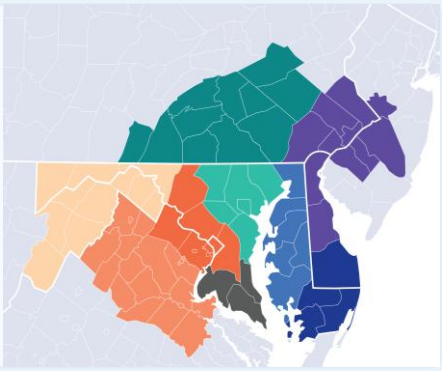
Local Markets	New Pending Sales		New Listings		Showings	
	Jan '26	vs. Jan '25	Jan '26	vs. Jan '25	Jan '26	vs. Jan '25
North Central VA	1,209	+18.4%	1,259	+13.9%	20,054	+11.9%
Caroline County, VA	25	-30.6%	32	-43.9%	320	+5.6%
Clarke County, VA	10	+42.9%	7	+40.0%	253	+204.8%
Culpeper County, VA	43	+10.3%	56	+5.7%	511	+25.9%
Fauquier County, VA	63	-1.6%	65	+16.1%	948	+41.5%
Frederick County, VA	114	+11.8%	141	+16.5%	1,573	+21.3%
Fredericksburg City, VA	20	+11.1%	21	-12.5%	323	+4.5%
King George County, VA	25	+31.6%	25	-3.8%	387	+33.0%
Madison County, VA	14	+180.0%	9	+28.6%	134	+131.0%
Manassas City, VA	29	+20.8%	36	+50.0%	563	-8.9%
Manassas Park City, VA	10	-16.7%	24	+60.0%	198	+42.4%
Orange County, VA	60	+11.1%	57	-17.4%	549	-10.3%
Page County, VA	23	+64.3%	25	+212.5%	290	+121.4%
Prince William County, VA	345	+17.7%	354	+23.8%	7,163	-0.3%
Rappahannock County, VA	3	-72.7%	5	+0.0%	79	-8.1%
Shenandoah County, VA	40	+29.0%	44	+7.3%	544	+21.7%
Spotsylvania County, VA	158	+42.3%	148	+13.0%	2,366	+27.1%
Stafford County, VA	153	+22.4%	131	+9.2%	2,814	+15.3%
Warren County, VA	46	+58.6%	53	+43.2%	669	-1.2%
Winchester City, VA	28	+3.7%	26	+30.0%	370	+19.0%

Local Markets

	Active Listings		Months of Supply	
	Jan '26	vs. Jan '25	Jan '26	vs. Jan '25
North Central VA	2,438	+26.1%	1.78	+0.41 months
Caroline County, VA	73	-22.3%	2.03	-0.38 months
Clarke County, VA	34	+126.7%	2.43	+1.36 months
Culpeper County, VA	146	+43.1%	2.92	+1 months
Fauquier County, VA	140	+23.9%	1.82	+0.35 months
Frederick County, VA	271	+13.4%	2.08	+0.21 months
Fredericksburg City, VA	44	-17.0%	2.00	-0.3 months
King George County, VA	57	+3.6%	2.28	+0.45 months
Madison County, VA	21	-25.0%	1.91	-0.64 months
Manassas City, VA	45	+40.6%	1.29	+0.47 months
Manassas Park City, VA	27	+145.5%	1.59	+0.94 months
Orange County, VA	181	+29.3%	2.87	+0.37 months
Page County, VA	74	+94.7%	3.52	+1.71 months
Prince William County, VA	478	+54.7%	1.14	+0.44 months
Rappahannock County, VA	31	+34.8%	5.17	+1.34 months
Shenandoah County, VA	106	+5.0%	2.08	+0.1 months
Spotsylvania County, VA	275	+15.1%	1.81	+0.28 months
Stafford County, VA	273	+24.7%	1.72	+0.35 months
Warren County, VA	106	+9.3%	2.30	+0.43 months
Winchester City, VA	56	+115.4%	2.07	+1.2 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

January 2026 Detached Single-Family Home Report

Prepared by Bright Research

Data as of February 5, 2026

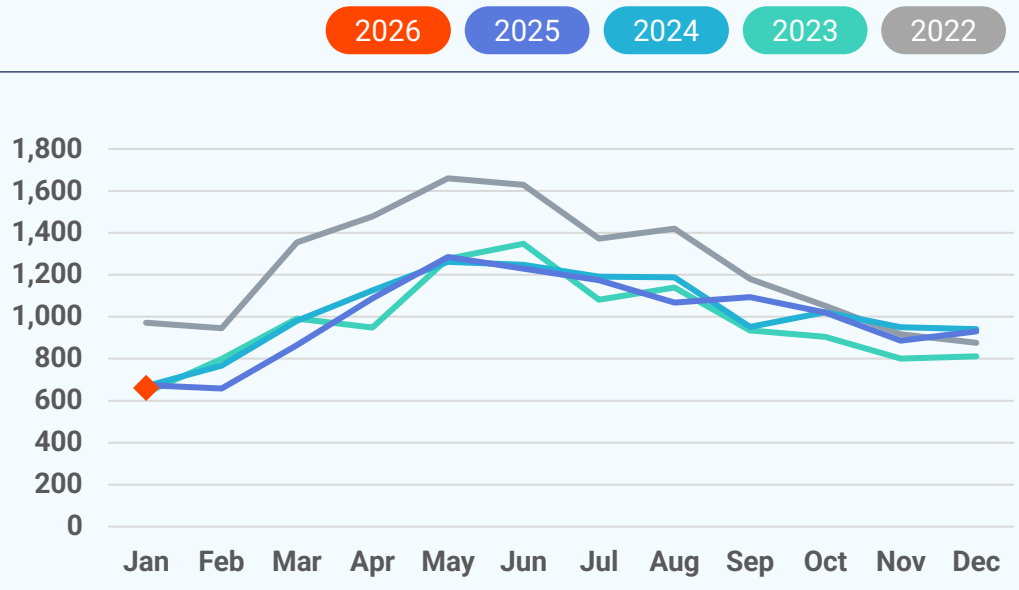
Key Market Statistics	Jan 2026	Jan 2025	Change
Closed Sales	661	674	-1.9%
Median Sold Price	$510,000	$515,000	-1.0%
Median Days on Market	35 days	27 days	+8 days
New Pending Sales	884	762	+16.0%
New Listings	872	826	+5.6%
Active Listings	1,873	1,575	+18.9%
Months of Supply	1.84	1.49	+0.35 mos.

Closed Sales

661
January 2026

-1.9%
Jan '26 vs. Jan '25
(Jan '25: 674)

-28.9%
Jan '26 vs. Dec '25
(Dec '25: 930)



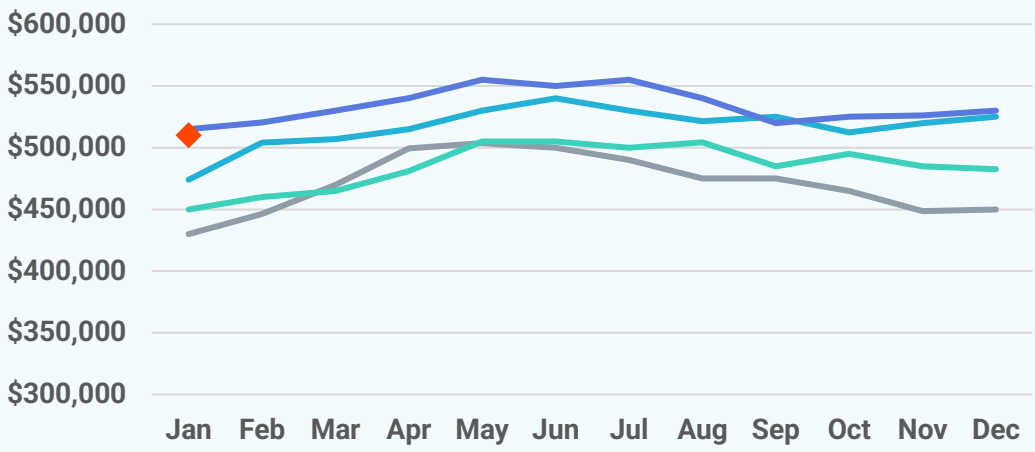
Median Sold Price

2026 2025 2024 2023 2022

$510,000
January 2026

-1.0%
Jan '26 vs. Jan '25
(Jan '25: $515,000)

-3.8%
Jan '26 vs. Dec '25
(Dec '25: $530,000)



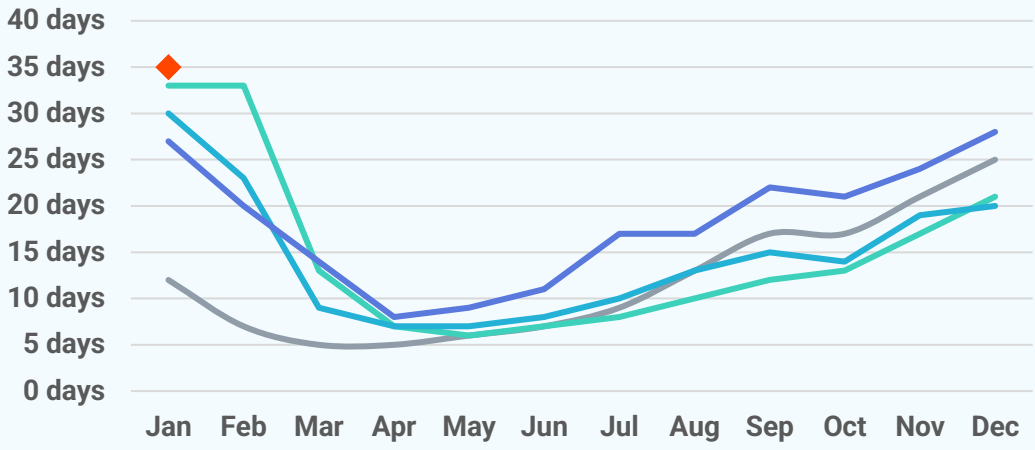
Median Days on Market

2026 2025 2024 2023 2022

35 days
January 2026

+8 days
Jan '26 vs. Jan '25
(Jan '25: 27 days)

+7 days
Jan '26 vs. Dec '25
(Dec '25: 28 days)



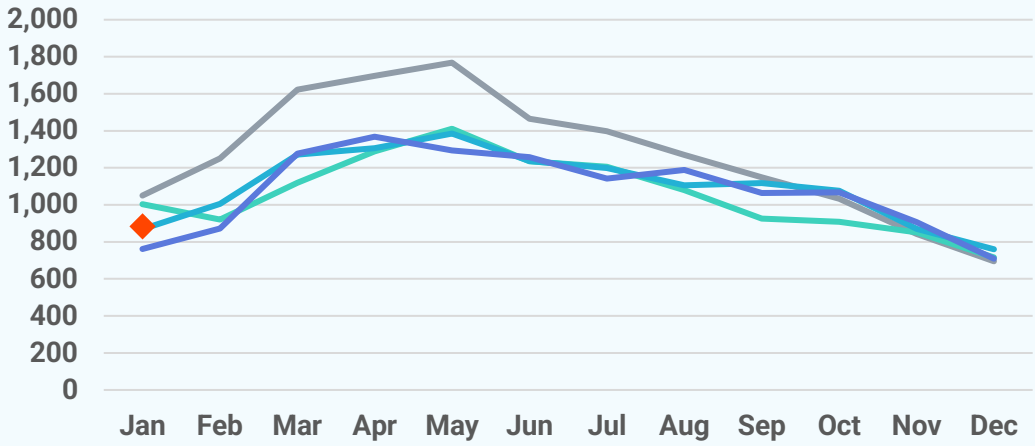
New Pending Sales

2026 2025 2024 2023 2022

884
January 2026

+16.0%
Jan '26 vs. Jan '25
(Jan '25: 762)

+24.7%
Jan '26 vs. Dec '25
(Dec '25: 709)



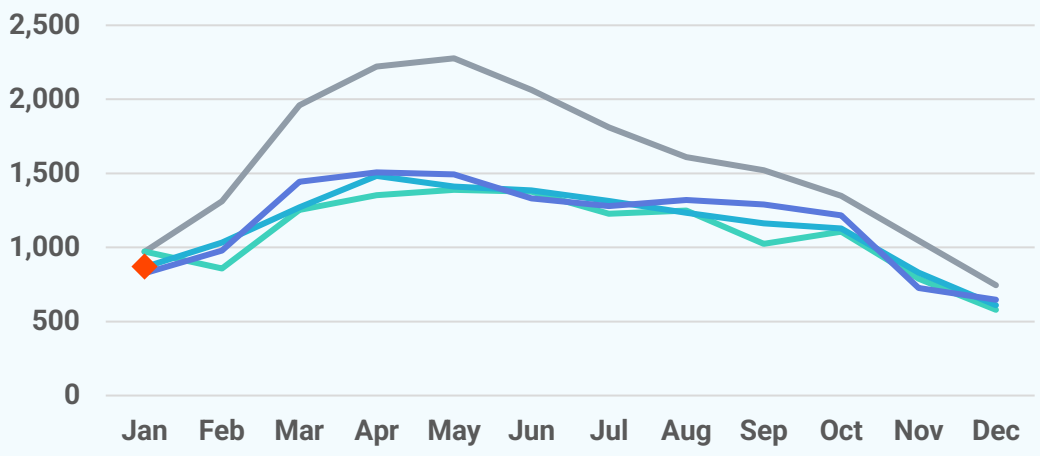
New Listings

2026 2025 2024 2023 2022

872
January 2026

+5.6%
Jan '26 vs. Jan '25
(Jan '25: 826)

+34.8%
Jan '26 vs. Dec '25
(Dec '25: 647)



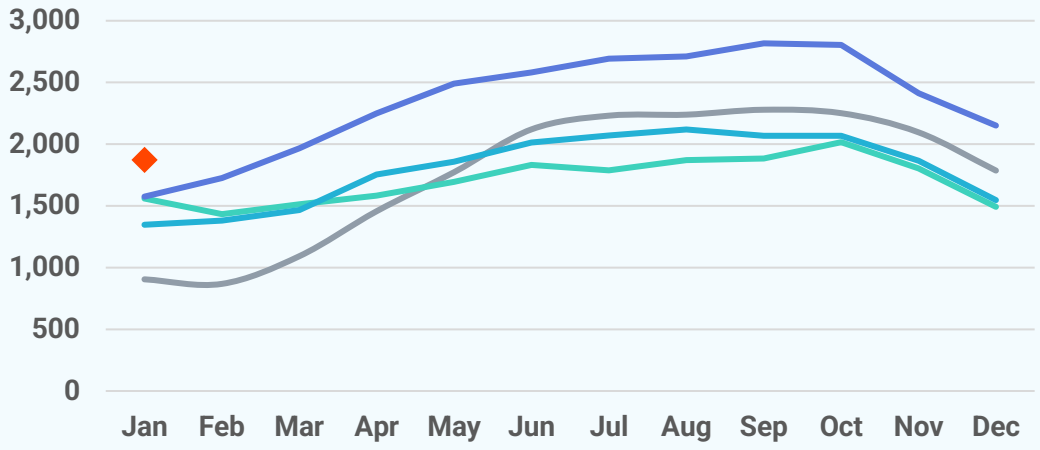
Active Listings

2026 2025 2024 2023 2022

1,873
January 2026

+18.9%
Jan '26 vs. Jan '25
(Jan '25: 1,575)

-12.9%
Jan '26 vs. Dec '25
(Dec '25: 2,150)



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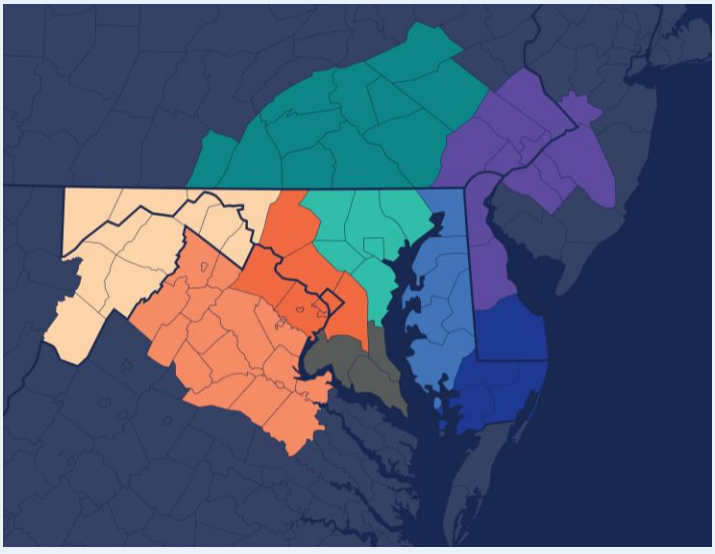


North Central Virginia

January 2026 Attached/Townhomes Report

Prepared by Bright Research

Data as of February 5, 2026

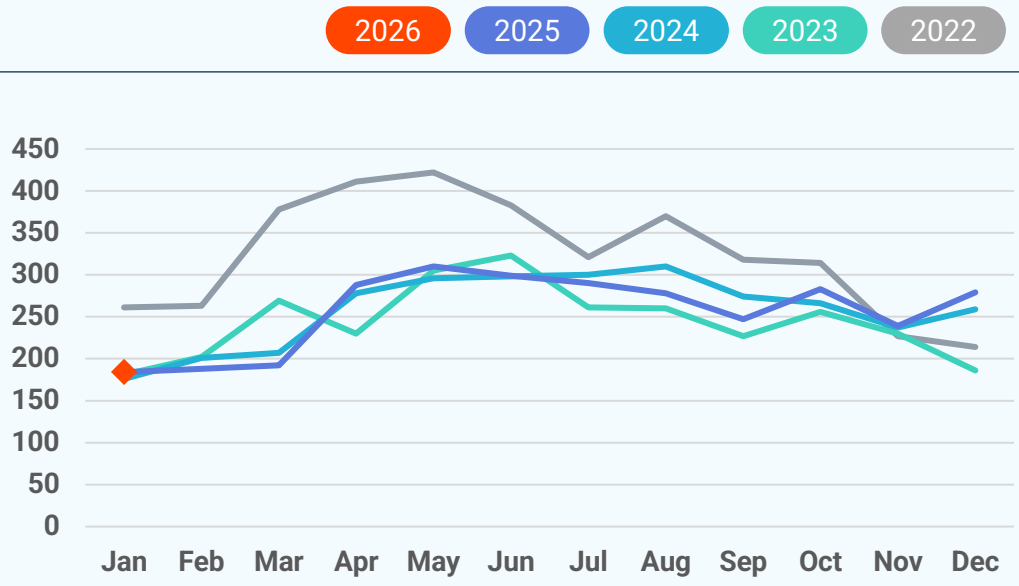
Key Market Statistics	Jan 2026	Jan 2025	Change
Closed Sales	184	184	+0.0%
Median Sold Price	$441,000	$410,000	+7.6%
Median Days on Market	23 days	15 days	+8 days
New Pending Sales	225	192	+17.2%
New Listings	243	210	+15.7%
Active Listings	336	251	+33.9%
Months of Supply	1.27	0.94	+0.33 mos.

Closed Sales

184
January 2026

+0.0%
Jan '26 vs. Jan '25
(Jan '25: 184)

-34.1%
Jan '26 vs. Dec '25
(Dec '25: 279)



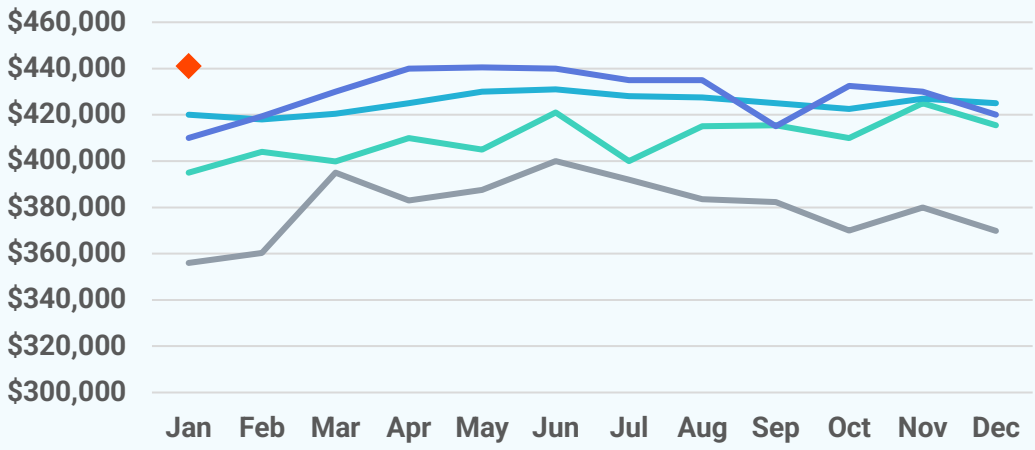
Median Sold Price

2026 2025 2024 2023 2022

$441,000
January 2026

+7.6%
Jan '26 vs. Jan '25
(Jan '25: $410,000)

+5.0%
Jan '26 vs. Dec '25
(Dec '25: $420,000)



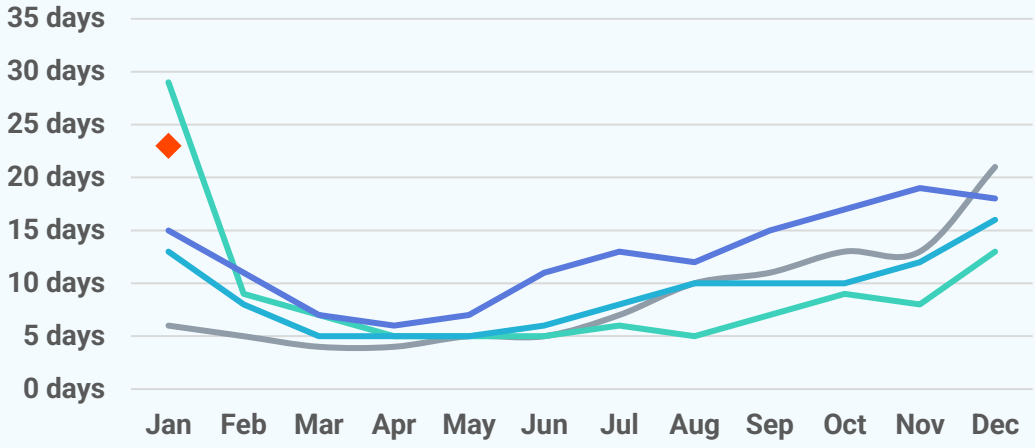
Median Days on Market

2026 2025 2024 2023 2022

23 days
January 2026

+8 days
Jan '26 vs. Jan '25
(Jan '25: 15 days)

+5 days
Jan '26 vs. Dec '25
(Dec '25: 18 days)



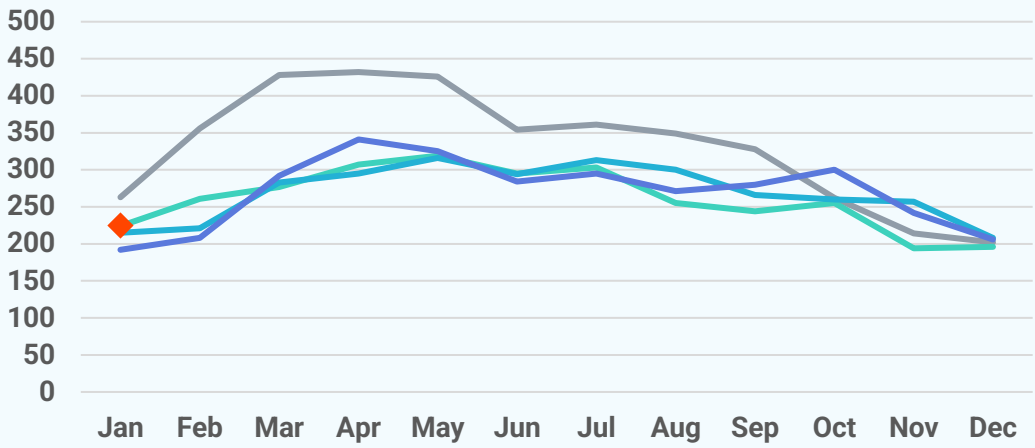
New Pending Sales

2026 2025 2024 2023 2022

225
January 2026

+17.2%
Jan '26 vs. Jan '25
(Jan '25: 192)

+9.2%
Jan '26 vs. Dec '25
(Dec '25: 206)



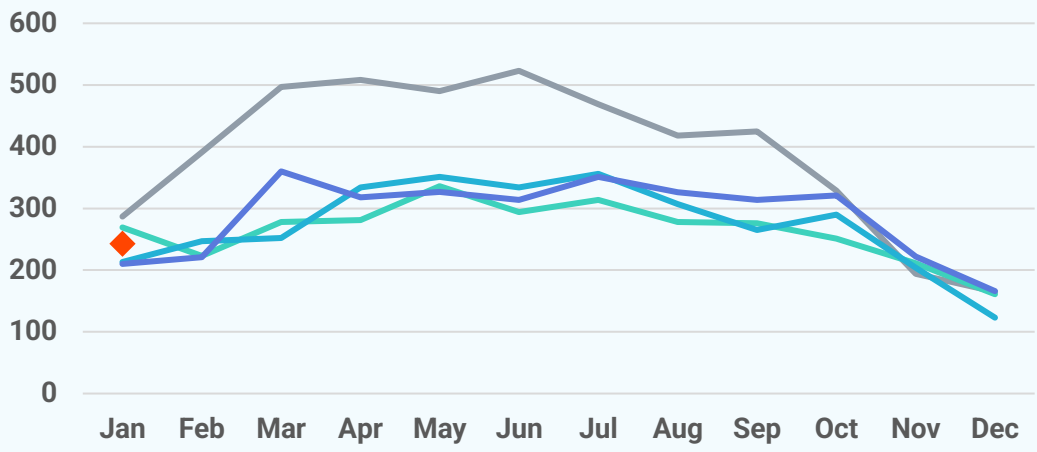
New Listings

2026 2025 2024 2023 2022

243
January 2026

+15.7%
Jan '26 vs. Jan '25
(Jan '25: 210)

+46.4%
Jan '26 vs. Dec '25
(Dec '25: 166)



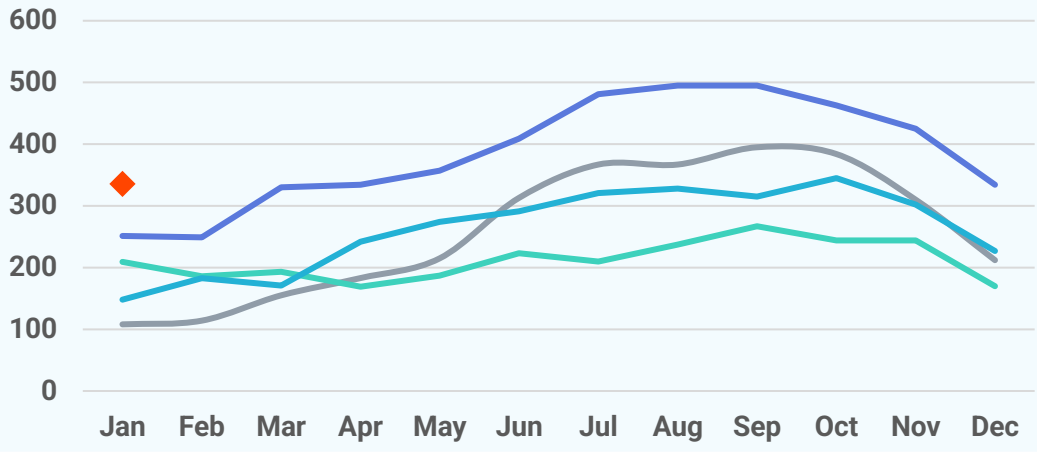
Active Listings

2026 2025 2024 2023 2022

336
January 2026

+33.9%
Jan '26 vs. Jan '25
(Jan '25: 251)

+0.6%
Jan '26 vs. Dec '25
(Dec '25: 334)



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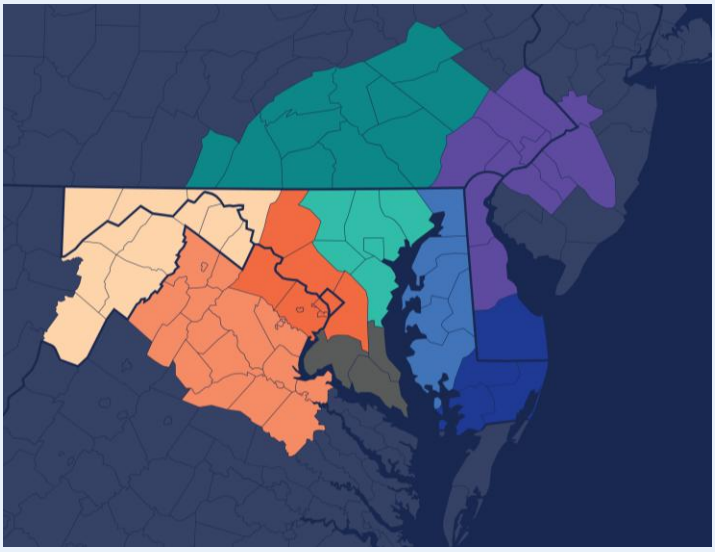


North Central Virginia

January 2026 Condos Report

Prepared by Bright Research

Data as of February 5, 2026

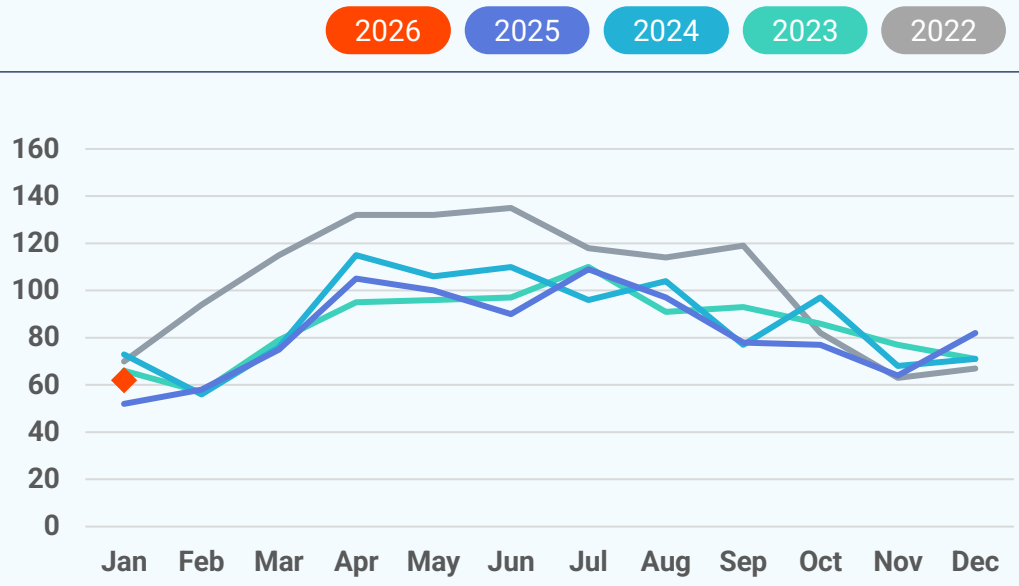
Key Market Statistics	Jan 2026	Jan 2025	Change
Closed Sales	62	52	+19.2%
Median Sold Price	$377,500	$408,500	-7.6%
Median Days on Market	50 days	17 days	+33 days
New Pending Sales	100	66	+51.5%
New Listings	143	69	+107.2%
Active Listings	229	108	+112.0%
Months of Supply	2.63	1.23	+1.40 mos.

Closed Sales

62
January 2026

+19.2%
Jan '26 vs. Jan '25
(Jan '25: 52)

-24.4%
Jan '26 vs. Dec '25
(Dec '25: 82)



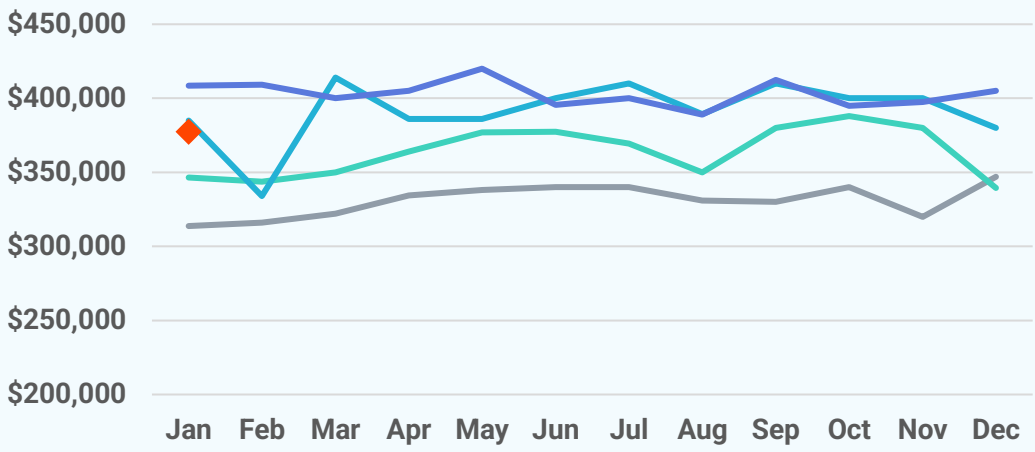
Median Sold Price

2026 2025 2024 2023 2022

$377,500
January 2026

-7.6%
Jan '26 vs. Jan '25
(Jan '25: $408,500)

-6.8%
Jan '26 vs. Dec '25
(Dec '25: $405,000)



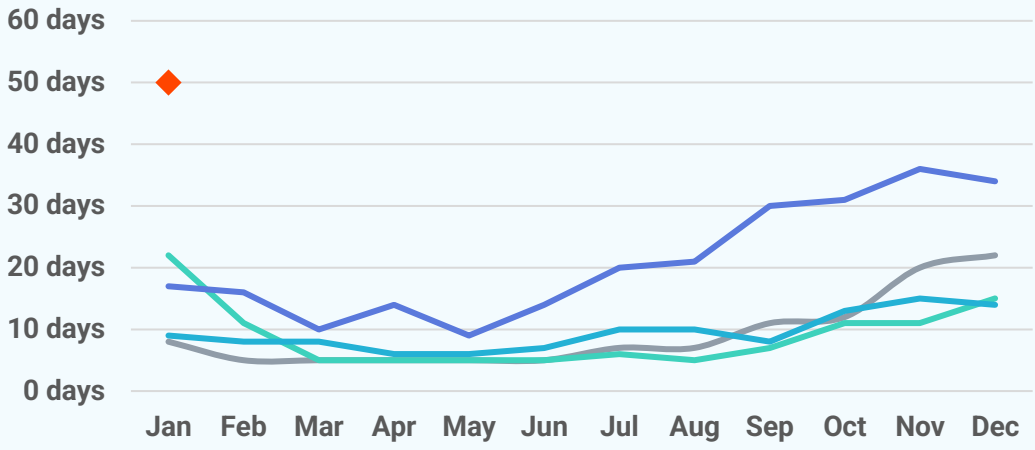
Median Days on Market

2026 2025 2024 2023 2022

50 days
January 2026

+33 days
Jan '26 vs. Jan '25
(Jan '25: 17 days)

+16 days
Jan '26 vs. Dec '25
(Dec '25: 34 days)



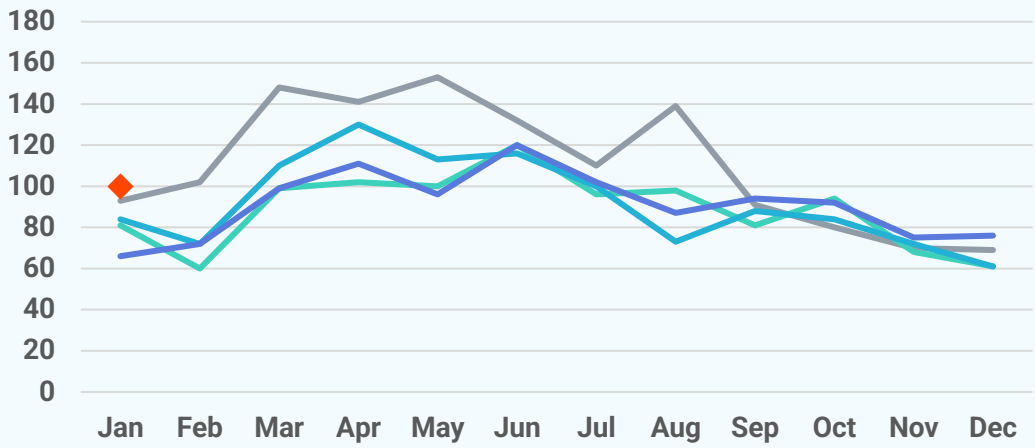
New Pending Sales

2026 2025 2024 2023 2022

100
January 2026

+51.5%
Jan '26 vs. Jan '25
(Jan '25: 66)

+31.6%
Jan '26 vs. Dec '25
(Dec '25: 76)



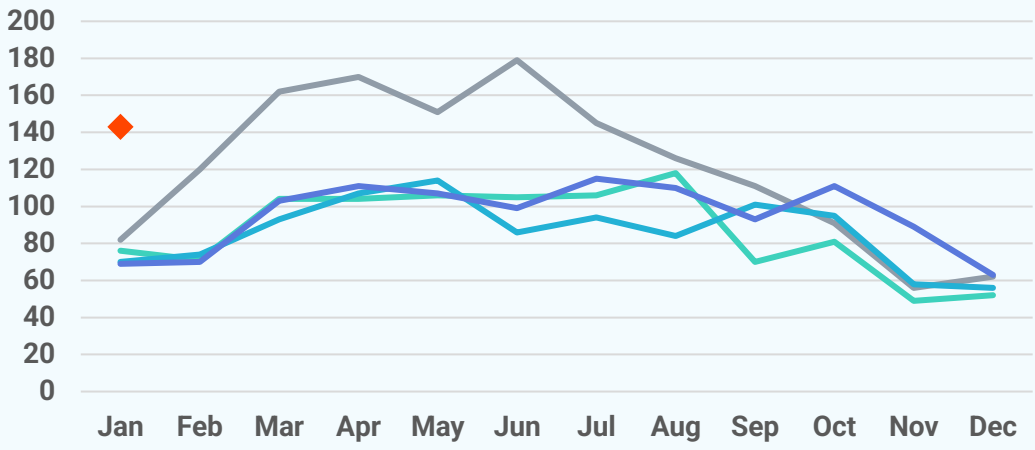
New Listings

2026 2025 2024 2023 2022

143
January 2026

+107.2%
Jan '26 vs. Jan '25
(Jan '25: 69)

+127.0%
Jan '26 vs. Dec '25
(Dec '25: 63)



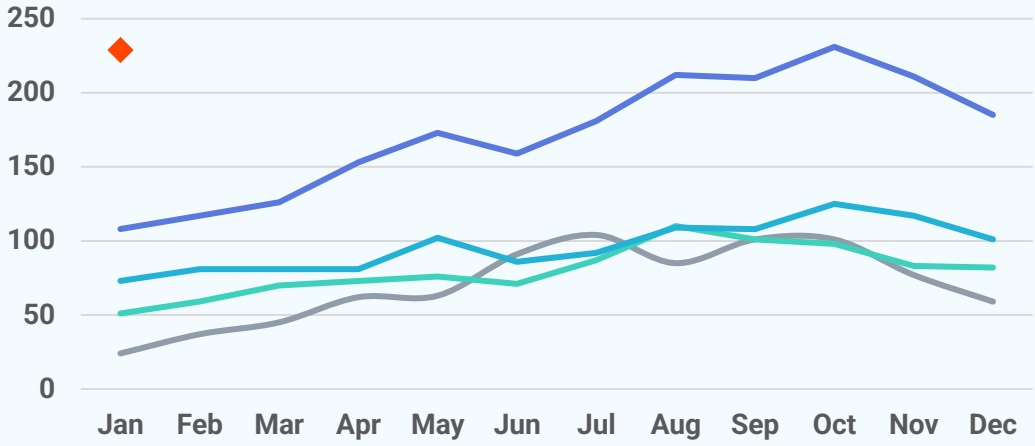
Active Listings

2026 2025 2024 2023 2022

229
January 2026

+112.0%
Jan '26 vs. Jan '25
(Jan '25: 108)

+23.8%
Jan '26 vs. Dec '25
(Dec '25: 185)



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**.

