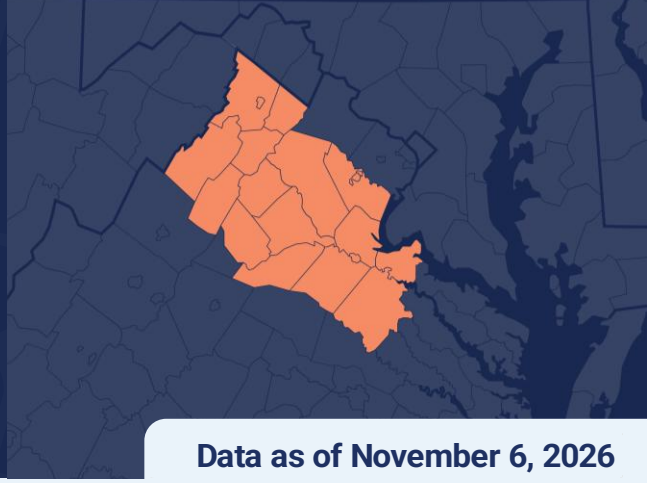
North Central Virginia

October 2026 Housing Market Report

Prepared by Bright Research



Data as of November 6, 2026

Key Market Statistics	Oct 2026	Oct 2025	Change	YTD 2026	YTD 2025	Change
Closed Sales	1,167	1,360	-14.2%	13,760	13,475	+2.1%
Median Sold Price	$500,000	$485,000	+3.1%	$510,000	$500,000	+2.0%
Median Days on Market	23 days	18 days	+5 days	15 days	13 days	+2 days
New Purchase Contracts	1,226	1,555	-21.2%	16,078	16,011	+0.4%
New Listings	1,815	1,851	-1.9%	20,846	19,380	+7.6%
Active Listings	4,542	3,490	+30.1%	4,542	3,490	+30.1%
Months of Supply	3.36	2.62	+0.74 mos.	3.36	2.62	+0.74 mos.
Showings	15,247	18,912	-19.4%	192,454	196,352	-2.0%

Housing Market Trends

Housing market activity stalls across the North Central Virginia region. As mortgage rates pushed past 7%, homebuyers are pulling back this fall. In October, there were just 1,167 total closed sales across the North Central Virginia region, a 14.2% drop compared to October 2025. New purchase contracts were down 21.2% year-over-year and showings fell by 19.4%. Buyer demand was down sharply in nearly all local markets in the region.

A total of 1,815 new listings came onto the market in October, which was 1.9% lower than last year at this time. Some sellers are hesitating amidst the pullback in demand.

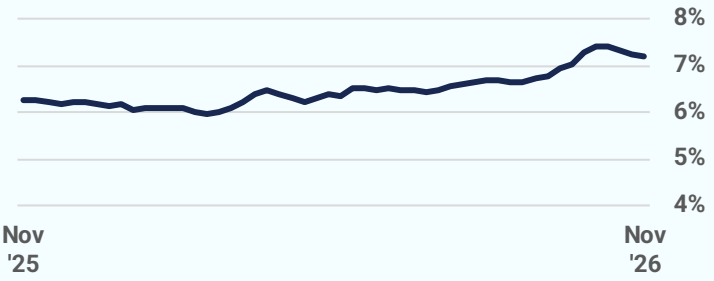
Homes are taking longer to sell. The median days on market in October was 23, which was five days slower than a year ago.

The median sold price in the North Central Virginia increased by 3.1% in October to $500,000.

Market Outlook

Higher-income buyers continue to be most active in the North Central Virginia market, with more interest rate sensitive buyers on the sidelines waiting for 2027 when they hope market conditions will improve. Expect sluggish home sales through the end of the year, with slower home price growth. Buyers will have more leverage and sellers will need to reset pricing expectations.

Weekly Avg. Mortgage Rate 30-yr fixed rate



Source: Freddie Mac

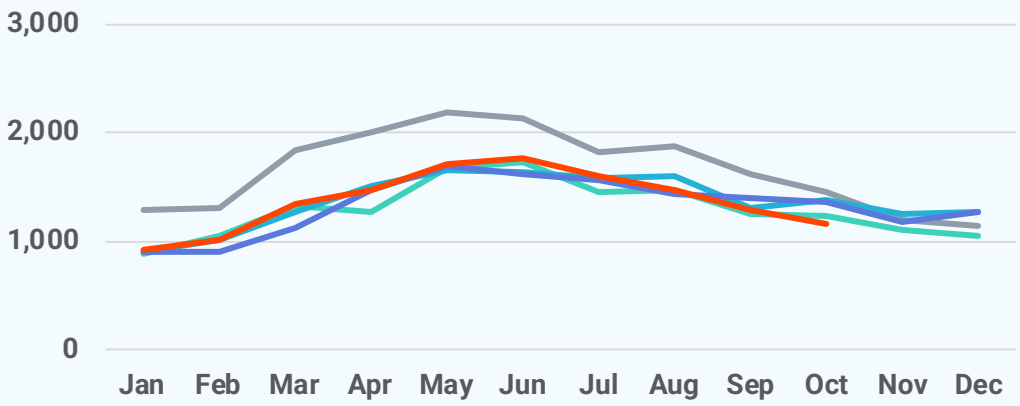
Closed Sales

2026 2025 2024 2023 2022

1,167
October 2026

-14.2%
Oct '26 vs. Oct '25
(Oct '25: 1,360)

-9.3%
Oct '26 vs. Sep '26
(Sep '26: 1,286)



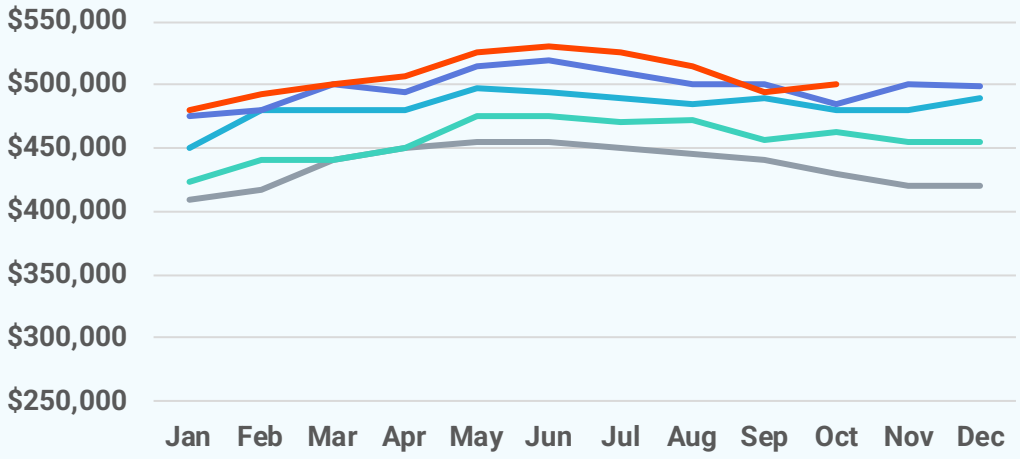
Median Sold Price

2026 2025 2024 2023 2022

$500,000
October 2026

+3.1%
Oct '26 vs. Oct '25
(Oct '25: $485,000)

+1.1%
Oct '26 vs. Sep '26
(Sep '26: $494,803)



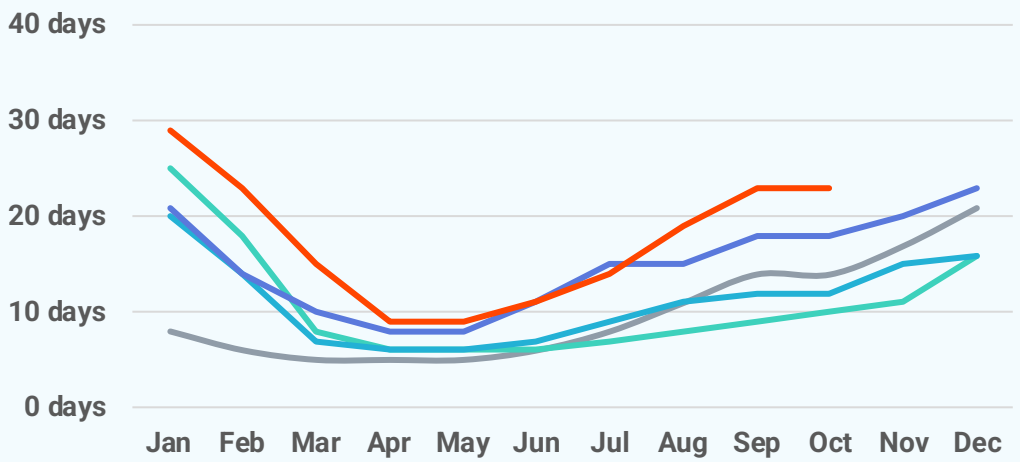
Median Days on Market

2026 2025 2024 2023 2022

23 days
October 2026

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

+0 days
Oct '26 vs. Sep '26
(Sep '26: 23 days)



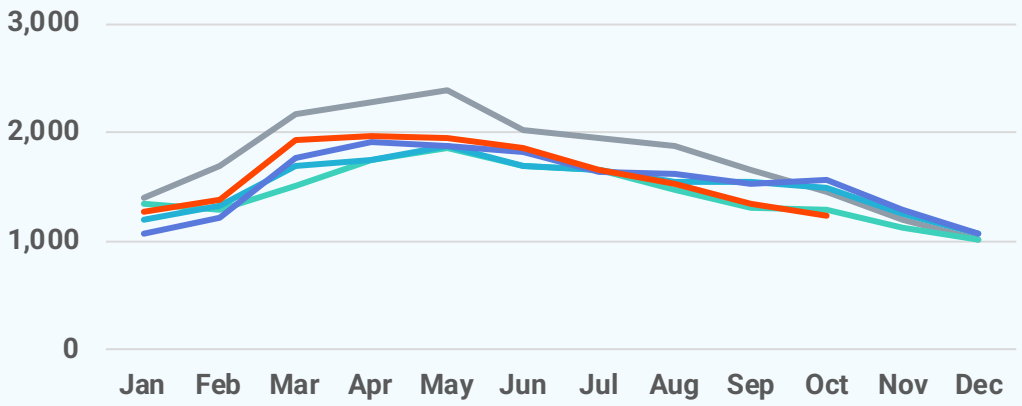
New Purchase Contracts

2026 2025 2024 2023 2022

1,226
October 2026

-21.2%
Oct '26 vs. Oct '25
(Oct '25: 1,555)

-8.6%
Oct '26 vs. Sep '26
(Sep '26: 1,342)



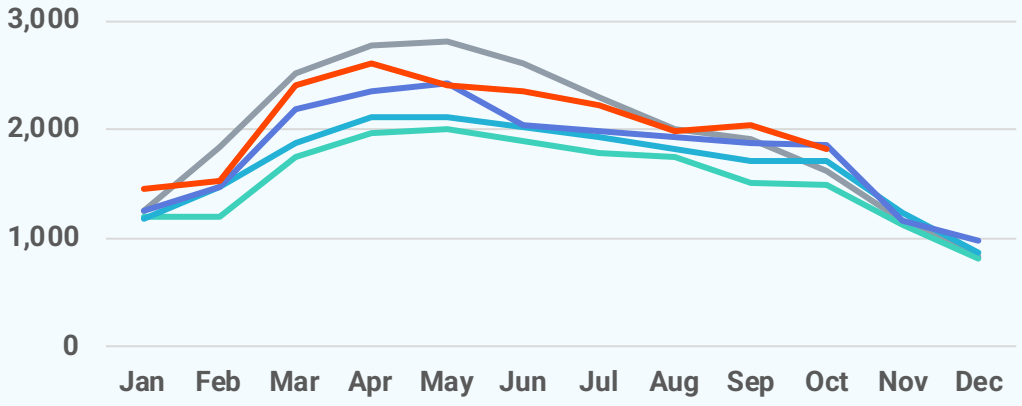
New Listings

2026 2025 2024 2023 2022

1,815
October 2026

-1.9%
Oct '26 vs. Oct '25
(Oct '25: 1,851)

-11.3%
Oct '26 vs. Sep '26
(Sep '26: 2,047)



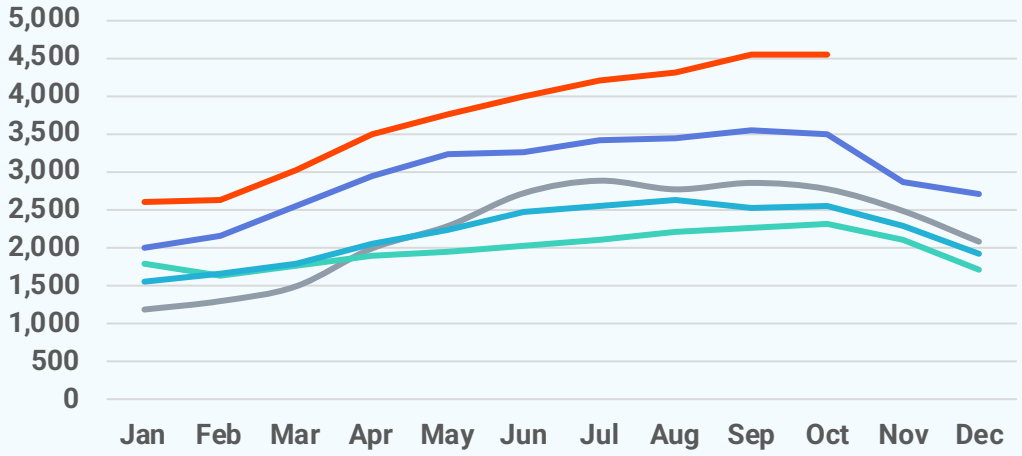
Active Listings

2026 2025 2024 2023 2022

4,542
October 2026

+30.1%
Oct '26 vs. Oct '25
(Oct '25: 3,490)

-0.1%
Oct '26 vs. Sep '26
(Sep '26: 4,545)



Local Markets	Closed Sales		Median Sales Price		Median Days on Market	
	Oct '26	vs. Oct '25	Oct '26	vs. Oct '25	Oct '26	vs. Oct '25
North Central VA	1,167	-14.2%	$500,000	+3.1%	23 days	+5 days
Caroline County, VA	31	+19.2%	$374,900	-4.6%	33 days	+0 days
Clarke County, VA	13	+8.3%	$549,900	+17.5%	14 days	-14 days
Culpeper County, VA	41	-31.7%	$518,000	+11.8%	13 days	-7 days
Fauquier County, VA	64	-22.0%	$629,000	-0.9%	22 days	+3 days
Frederick County, VA	121	-12.3%	$434,000	+4.6%	32 days	+11 days
Fredericksburg City, VA	21	+23.5%	$415,000	-2.4%	27 days	+10 days
King George County, VA	21	-22.2%	$532,300	+15.7%	35 days	+28 days
Madison County, VA	5	-50.0%	$430,000	-4.4%	25 days	-10 days
Manassas City, VA	30	+11.1%	$468,500	-13.2%	19 days	-8 days
Manassas Park City, VA	13	-18.8%	$428,000	-9.9%	6 days	-9 days
Orange County, VA	37	-22.9%	$385,000	-9.4%	29 days	+2 days
Page County, VA	20	-25.9%	$312,930	-2.2%	62 days	+3 days
Prince William County, VA	351	-20.0%	$560,500	-2.9%	17 days	+3 days
Rappahannock County, VA	7	-30.0%	$575,000	+14.4%	45 days	+22 days
Shenandoah County, VA	57	+0.0%	$355,000	+5.3%	26 days	+9 days
Spotsylvania County, VA	124	-13.9%	$460,000	-2.6%	28 days	+7 days
Stafford County, VA	152	+4.8%	$548,250	+4.4%	27 days	+9 days
Warren County, VA	40	-25.9%	$402,450	-7.3%	17 days	-7 days
Winchester City, VA	19	-9.5%	$375,000	-18.5%	22 days	+6 days

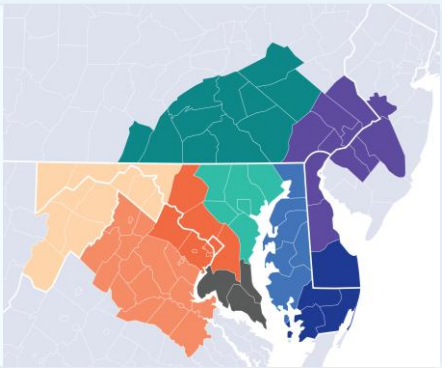
Local Markets	New Purchase Contracts		New Listings		Showings	
	Oct '26	vs. Oct '25	Oct '26	vs. Oct '25	Oct '26	vs. Oct '25
North Central VA	1,226	-21.2%	1,815	-1.9%	15,247	-19.4%
Caroline County, VA	38	-7.3%	57	+29.5%	290	+28.3%
Clarke County, VA	13	-23.5%	25	+13.6%	179	-17.1%
Culpeper County, VA	53	-15.9%	83	+27.7%	500	-11.0%
Fauquier County, VA	83	-11.7%	106	+11.6%	864	-17.5%
Frederick County, VA	109	-18.0%	166	+11.4%	1,311	-7.5%
Fredericksburg City, VA	19	-20.8%	23	-47.7%	236	-20.8%
King George County, VA	30	+15.4%	34	-12.8%	314	+6.1%
Madison County, VA	8	-55.6%	15	-11.8%	43	-49.4%
Manassas City, VA	27	-28.9%	49	+6.5%	375	-36.1%
Manassas Park City, VA	12	+9.1%	18	+38.5%	136	-1.4%
Orange County, VA	45	-25.0%	66	-16.5%	490	-13.9%
Page County, VA	24	+4.3%	31	+40.9%	140	-28.2%
Prince William County, VA	366	-29.2%	517	-4.6%	5,359	-22.3%
Rappahannock County, VA	6	-33.3%	10	-28.6%	75	-33.0%
Shenandoah County, VA	66	+6.5%	62	-8.8%	492	-9.1%
Spotsylvania County, VA	123	-29.3%	221	-9.4%	1,539	-33.3%
Stafford County, VA	121	-26.7%	228	-1.7%	1,785	-22.4%
Warren County, VA	59	+34.1%	73	+7.4%	770	+15.3%
Winchester City, VA	24	-33.3%	31	-35.4%	349	-23.0%

Local Markets

	Active Listings		Months of Supply	
	Oct '26	vs. Oct '25	Oct '26	vs. Oct '25
North Central VA	4,542	+30.1%	3.36	+0.74 months
Caroline County, VA	128	+34.7%	4.19	+1.61 months
Clarke County, VA	65	+30.0%	4.19	+0.58 months
Culpeper County, VA	257	+36.7%	5.12	+1.05 months
Fauquier County, VA	277	+42.1%	3.51	+0.93 months
Frederick County, VA	467	+43.7%	3.89	+1.41 months
Fredericksburg City, VA	76	+4.1%	3.23	-0.1 months
King George County, VA	128	+62.0%	5.05	+1.89 months
Madison County, VA	31	+6.9%	3.32	-0.12 months
Manassas City, VA	102	+54.5%	2.70	+0.72 months
Manassas Park City, VA	28	+16.7%	2.00	+0.32 months
Orange County, VA	208	-3.3%	4.12	-0.08 months
Page County, VA	105	+26.5%	4.55	+0.2 months
Prince William County, VA	1,046	+37.5%	2.45	+0.62 months
Rappahannock County, VA	53	+17.8%	8.26	+1.91 months
Shenandoah County, VA	185	+27.6%	3.75	+0.88 months
Spotsylvania County, VA	500	+11.1%	3.28	+0.26 months
Stafford County, VA	552	+24.3%	3.37	+0.54 months
Warren County, VA	233	+49.4%	4.91	+1.71 months
Winchester City, VA	101	+50.7%	4.07	+1.62 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

October 2026
Detached Single-Family Home Report

Prepared by Bright Research

Data as of November 6, 2026

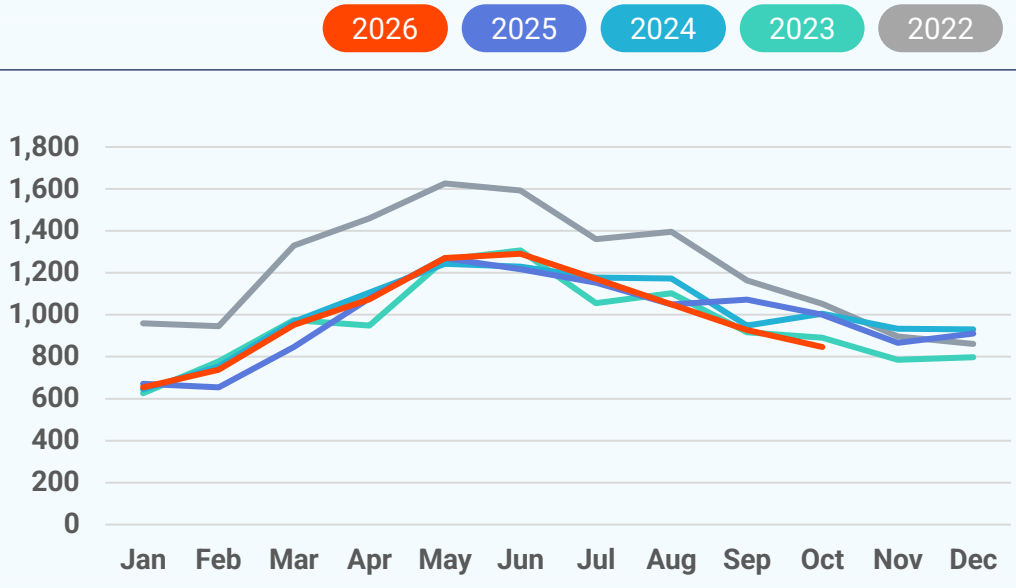
Key Market Statistics	Oct 2026	Oct 2025	Change
Closed Sales	846	1,001	-15.5%
Median Sold Price	$533,650	$525,000	+1.6%
Median Days on Market	24 days	18 days	+6 days
New Purchase Contracts	914	1,137	-19.6%
New Listings	1,327	1,361	-2.5%
Active Listings	3,534	2,772	+27.5%
Months of Supply	3.61	2.80	+0.81 mos.

Closed Sales

846
October 2026

-15.5%
Oct '26 vs. Oct '25
(Oct '25: 1,001)

-8.7%
Oct '26 vs. Sep '26
(Sep '26: 927)



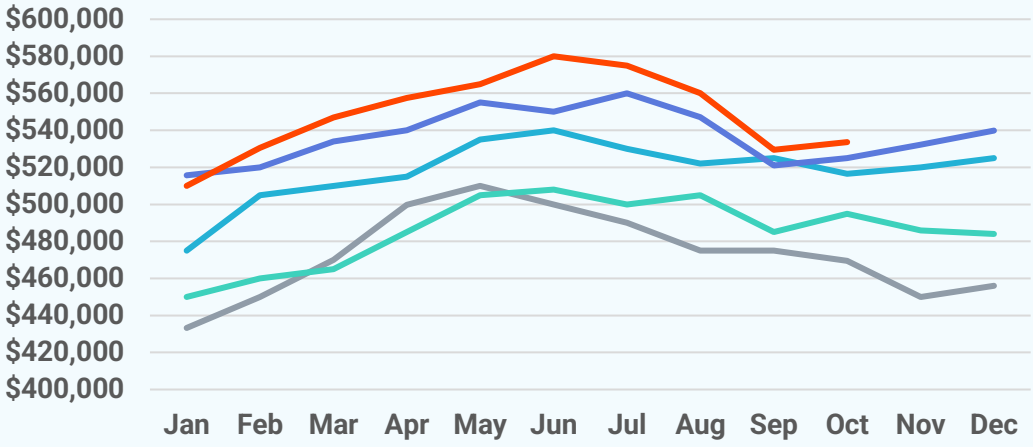
Median Sold Price

2026 2025 2024 2023 2022

$533,650
October 2026

+1.6%
Oct '26 vs. Oct '25
(Oct '25: $525,000)

+0.8%
Oct '26 vs. Sep '26
(Sep '26: $529,500)



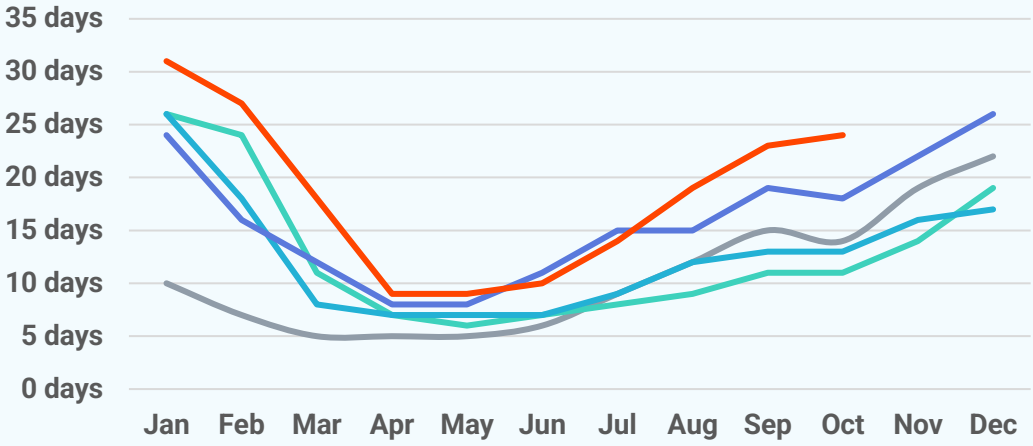
Median Days on Market

2026 2025 2024 2023 2022

24 days
October 2026

+6 days
Oct '26 vs. Oct '25
(Oct '25: 18 days)

+1 day
Oct '26 vs. Sep '26
(Sep '26: 23 days)



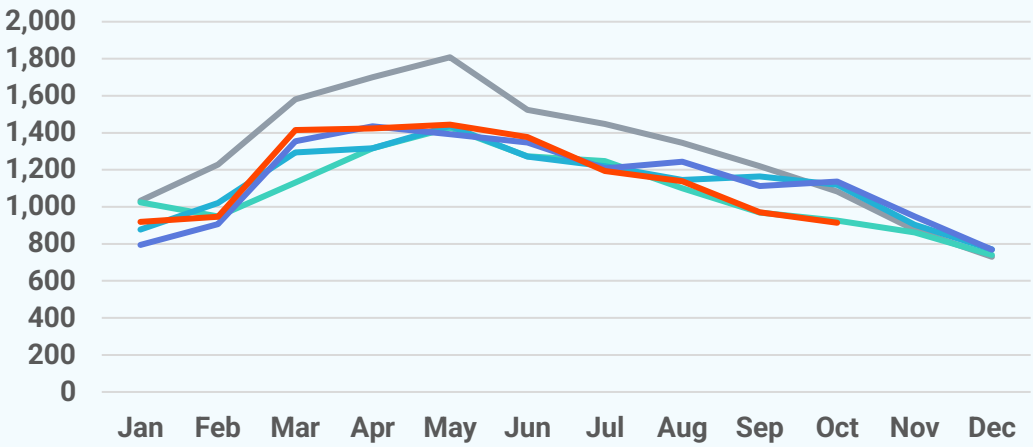
New Purchase Contracts

2026 2025 2024 2023 2022

914
October 2026

-19.6%
Oct '26 vs. Oct '25
(Oct '25: 1,137)

-5.9%
Oct '26 vs. Sep '26
(Sep '26: 971)



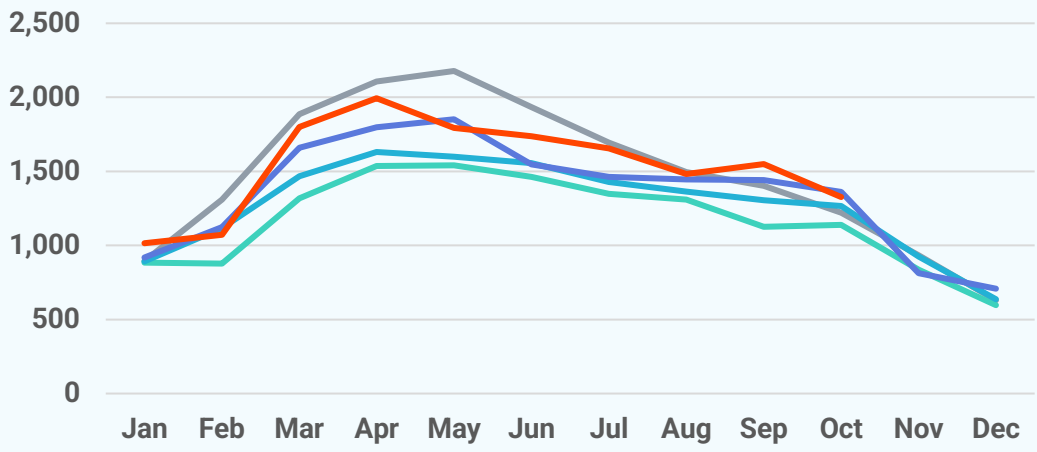
New Listings

2026 2025 2024 2023 2022

1,327
October 2026

-2.5%
Oct '26 vs. Oct '25
(Oct '25: 1,361)

-14.4%
Oct '26 vs. Sep '26
(Sep '26: 1,550)



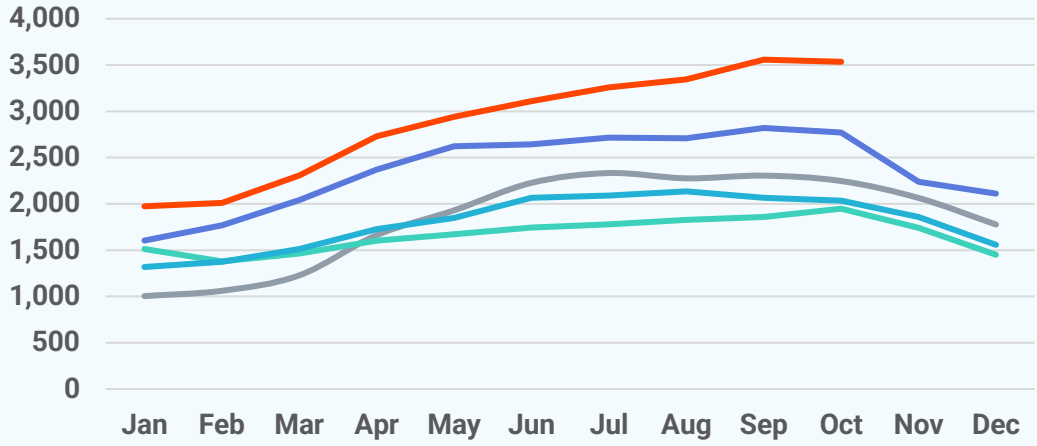
Active Listings

2026 2025 2024 2023 2022

3,534
October 2026

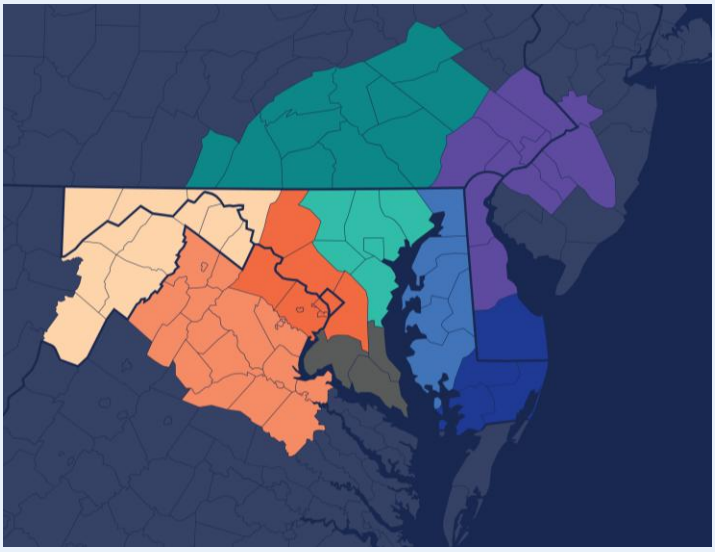
+27.5%
Oct '26 vs. Oct '25
(Oct '25: 2,772)

-0.7%
Oct '26 vs. Sep '26
(Sep '26: 3,558)



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

October 2026 Attached/Townhomes Report

Prepared by Bright Research

Data as of November 6, 2026

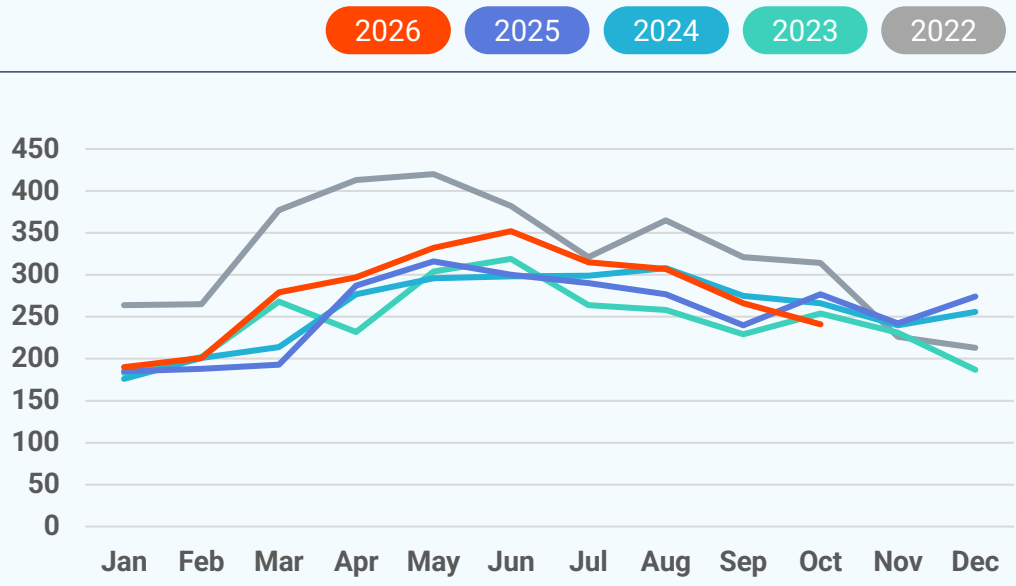
Key Market Statistics	Oct 2026	Oct 2025	Change
Closed Sales	241	277	-13.0%
Median Sold Price	$445,000	$435,000	+2.3%
Median Days on Market	19 days	16 days	+3 days
New Purchase Contracts	226	320	-29.4%
New Listings	356	364	-2.2%
Active Listings	678	473	+43.3%
Months of Supply	2.47	1.86	+0.61 mos.

Closed Sales

241
October 2026

-13.0%
Oct '26 vs. Oct '25
(Oct '25: 277)

-9.4%
Oct '26 vs. Sep '26
(Sep '26: 266)



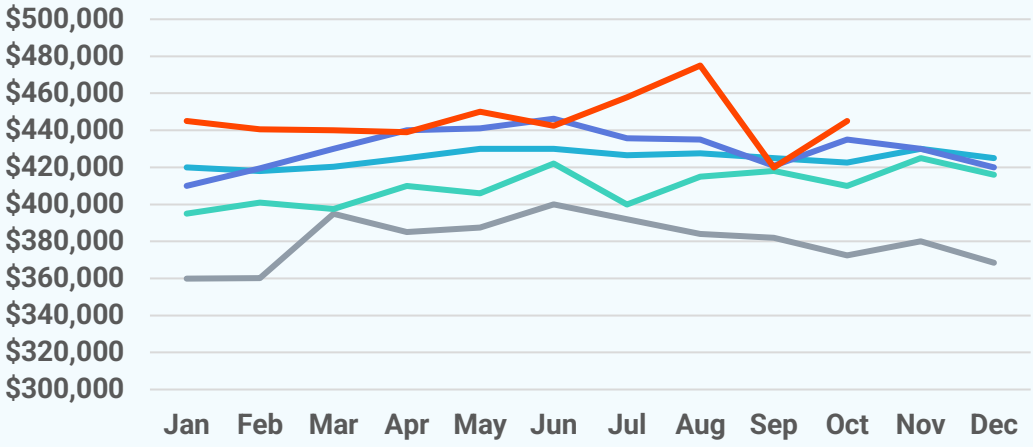
Median Sold Price

2026 2025 2024 2023 2022

$445,000
October 2026

+2.3%
Oct '26 vs. Oct '25
(Oct '25: $435,000)

+6.0%
Oct '26 vs. Sep '26
(Sep '26: $419,950)



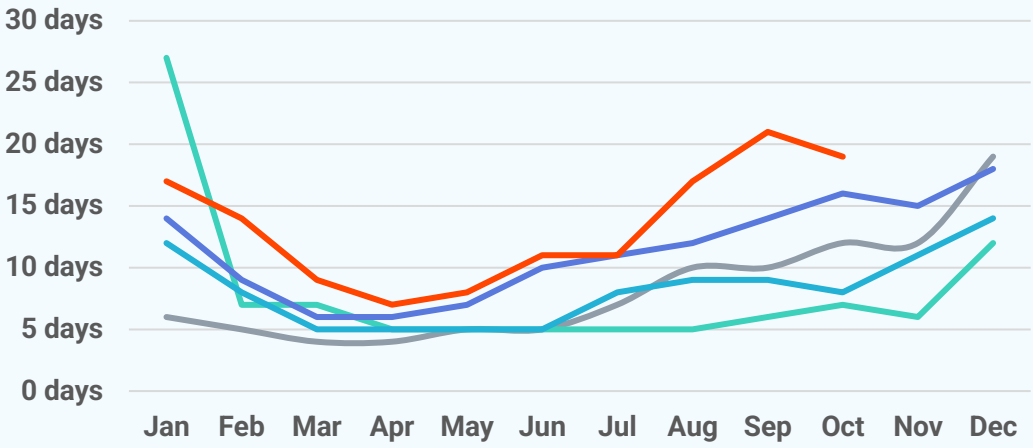
Median Days on Market

2026 2025 2024 2023 2022

19 days
October 2026

+3 days
Oct '26 vs. Oct '25
(Oct '25: 16 days)

-2 days
Oct '26 vs. Sep '26
(Sep '26: 21 days)



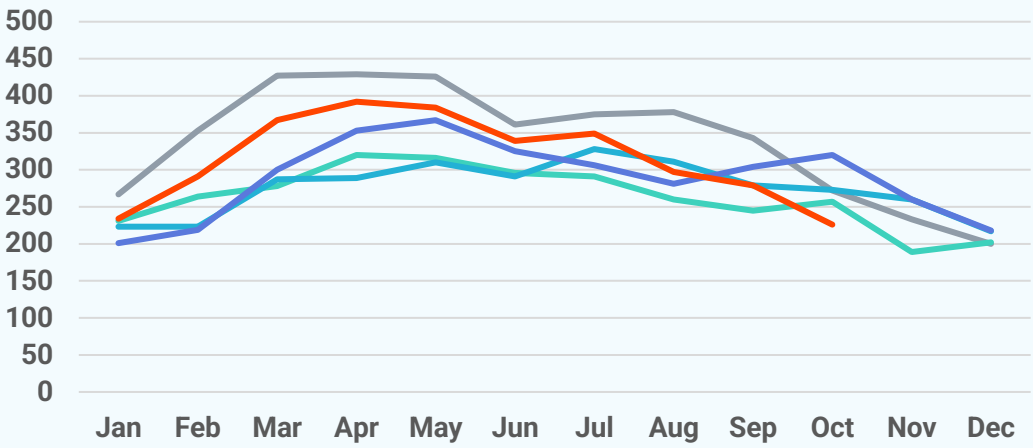
New Purchase Contracts

2026 2025 2024 2023 2022

226
October 2026

-29.4%
Oct '26 vs. Oct '25
(Oct '25: 320)

-19.0%
Oct '26 vs. Sep '26
(Sep '26: 279)



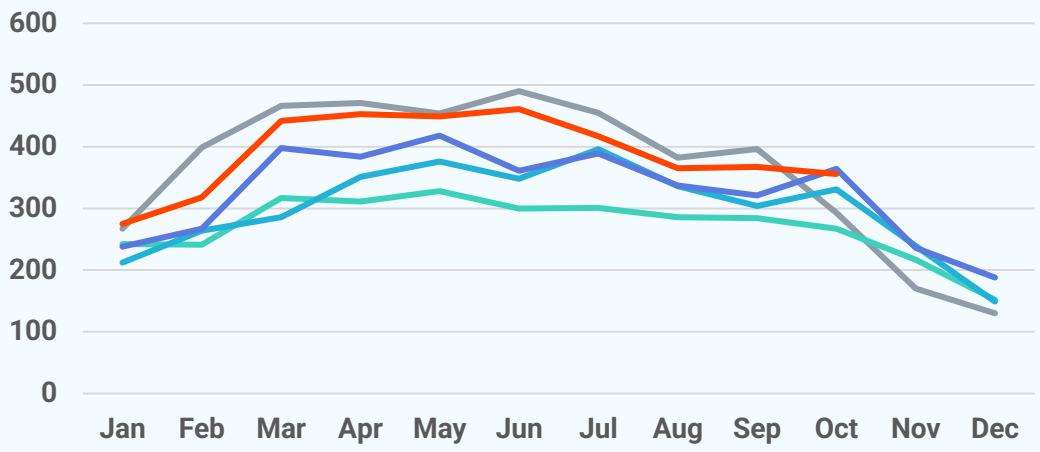
New Listings

2026 2025 2024 2023 2022

356
October 2026

-2.2%
Oct '26 vs. Oct '25
(Oct '25: 364)

-3.0%
Oct '26 vs. Sep '26
(Sep '26: 367)



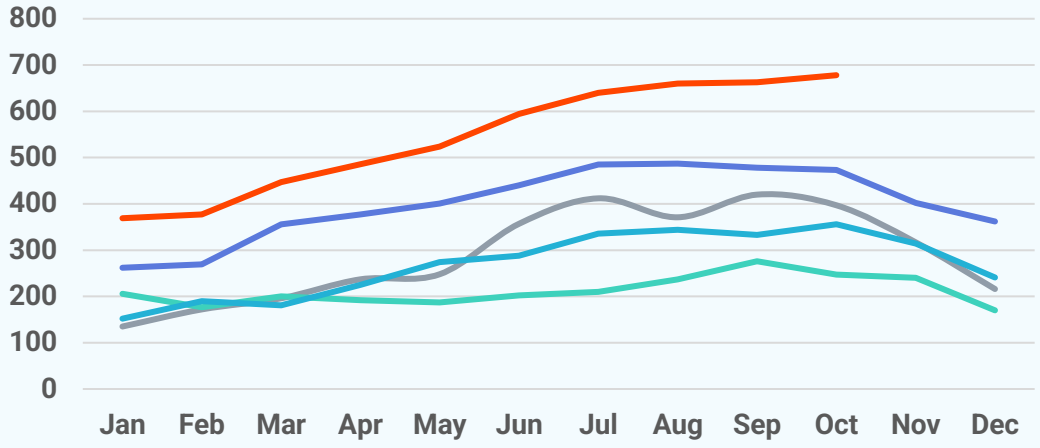
Active Listings

2026 2025 2024 2023 2022

678
October 2026

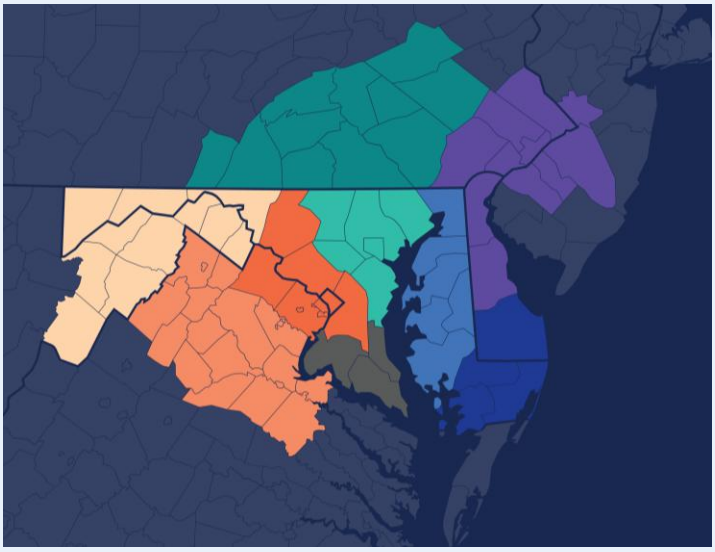
+43.3%
Oct '26 vs. Oct '25
(Oct '25: 473)

+2.3%
Oct '26 vs. Sep '26
(Sep '26: 663)



About Bright MLS

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North Central Virginia

October 2026 Condos Report

Prepared by Bright Research

Data as of November 6, 2026

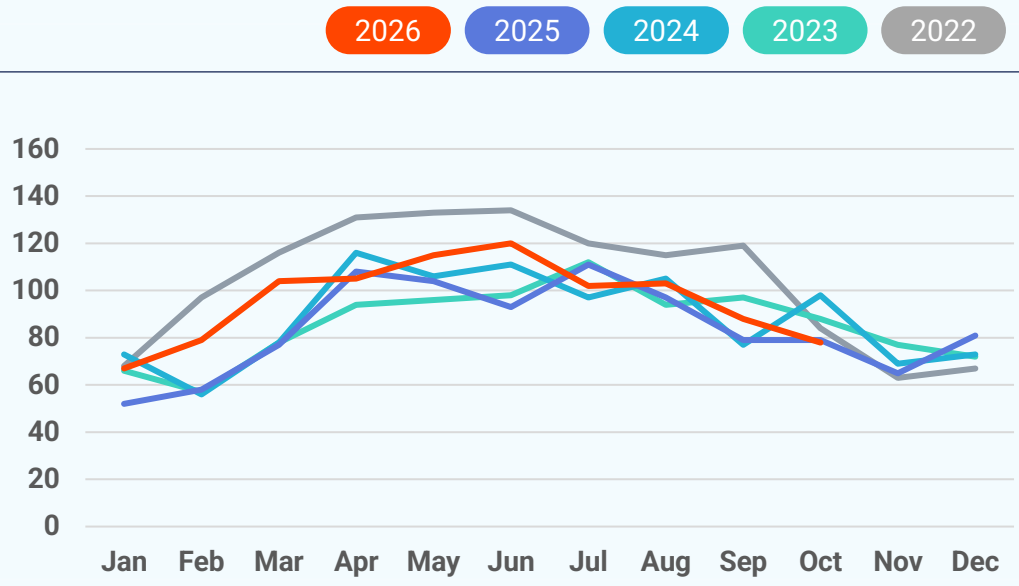
Key Market Statistics	Oct 2026	Oct 2025	Change
Closed Sales	78	79	-1.3%
Median Sold Price	$393,500	$395,000	-0.4%
Median Days on Market	25 days	26 days	-1 day
New Purchase Contracts	83	96	-13.5%
New Listings	125	121	+3.3%
Active Listings	307	229	+34.1%
Months of Supply	3.33	2.75	+0.58 mos.

Closed Sales

78
October 2026

-1.3%
Oct '26 vs. Oct '25
(Oct '25: 79)

-11.4%
Oct '26 vs. Sep '26
(Sep '26: 88)



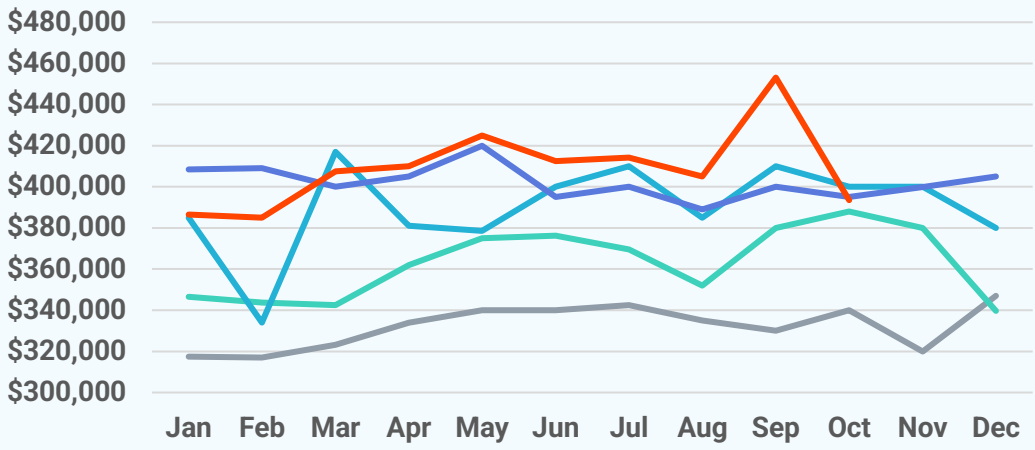
Median Sold Price

2026 2025 2024 2023 2022

$393,500
October 2026

-0.4%
Oct '26 vs. Oct '25
(Oct '25: $395,000)

-13.2%
Oct '26 vs. Sep '26
(Sep '26: $453,090)



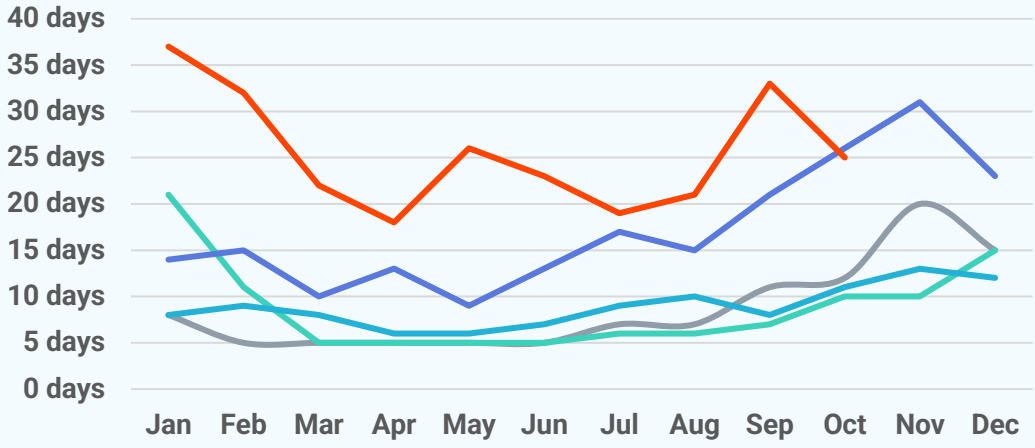
Median Days on Market

2026 2025 2024 2023 2022

25 days
October 2026

-1 day
Oct '26 vs. Oct '25
(Oct '25: 26 days)

-8 days
Oct '26 vs. Sep '26
(Sep '26: 33 days)



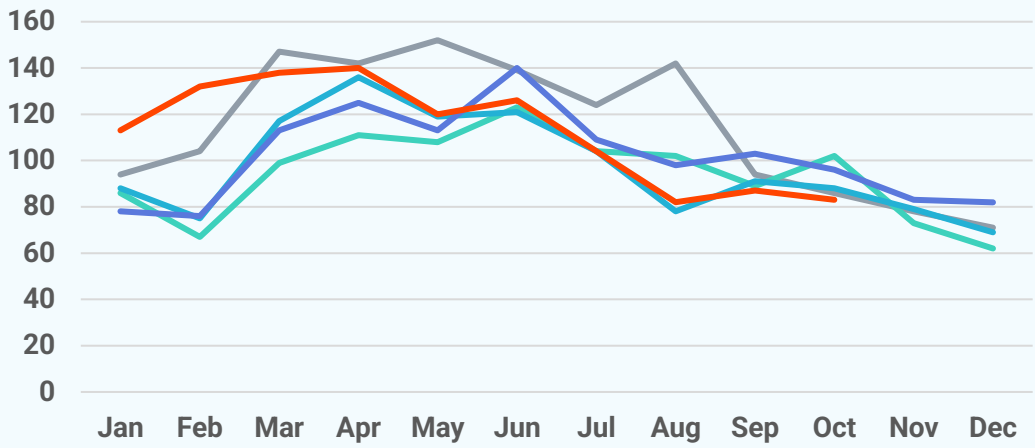
New Purchase Contracts

2026 2025 2024 2023 2022

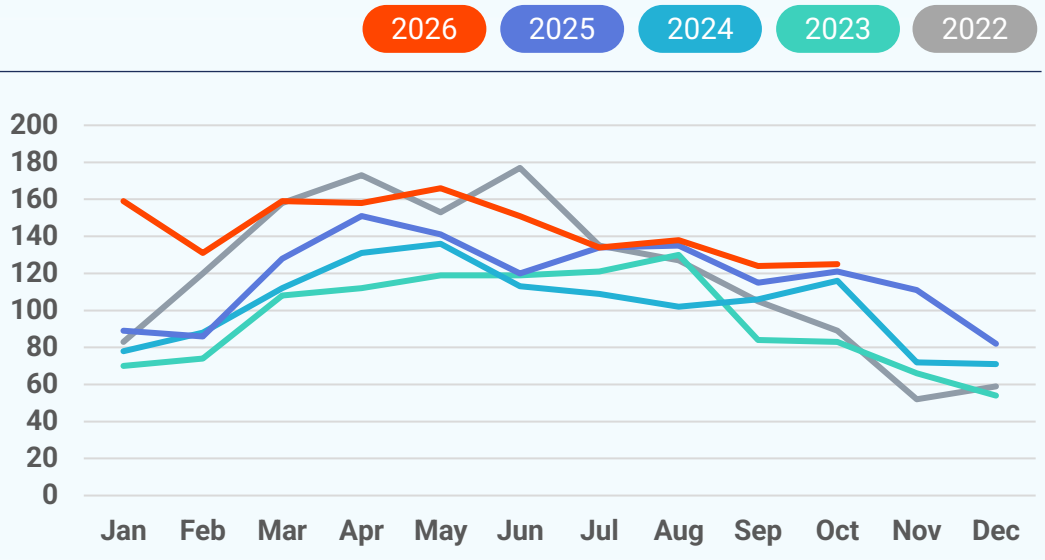
83
October 2026

-13.5%
Oct '26 vs. Oct '25
(Oct '25: 96)

-4.6%
Oct '26 vs. Sep '26
(Sep '26: 87)



New Listings

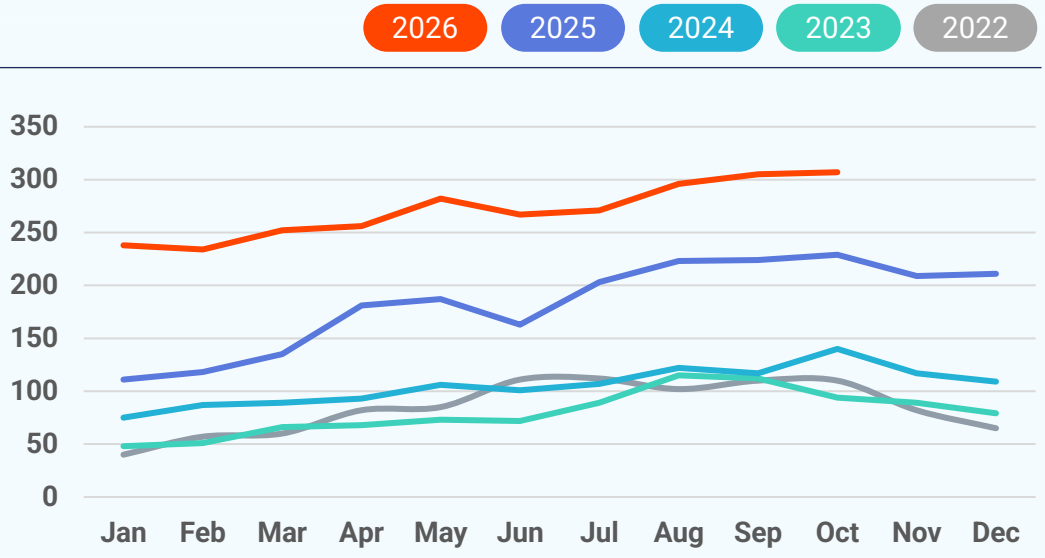


125
October 2026

+3.3%
Oct '26 vs. Oct '25
(Oct '25: 121)

+0.8%
Oct '26 vs. Sep '26
(Sep '26: 124)

Active Listings



307
October 2026

+34.1%
Oct '26 vs. Oct '25
(Oct '25: 229)

+0.7%
Oct '26 vs. Sep '26
(Sep '26: 305)

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**.

