

Housing Supply Overview

A Research Tool Provided by the Greater San Diego Association of REALTORS®

March 2025

U.S. sales of new single-family homes increased 1.8% month-over-month and 5.1% year-over-year to a seasonally adjusted annual rate of 676,000 units, according to the U.S. Census Bureau. There were about 500,000 new homes for sale heading into March, equivalent to an 8.9-month supply at the current sales rate. The median sales price for new homes slipped 1.5% year-over-year to \$414,500. For the 12-month period spanning April 2024 through March 2025, Pending Sales in the San Diego were up 5.0 percent overall. The price range with the largest gain in sales was the 2,000,001 to 5,000,000 range, where they increased 24.3 percent.

The overall Median Sales Price was up 4.7 percent to \$900,000. The property type with the largest price gain was the Single-Family Homes segment, where prices increased 6.3 percent to \$1,050,000. The price range that tended to sell the quickest was the \$1,250,001 to \$2,000,000 range at 31 days; the price range that tended to sell the slowest was the \$5,000,001 and Above range at 61 days.

Market-wide, inventory levels were up 42.6 percent. The property type with the largest gain was the Condos - Townhomes segment, where they increased 60.9 percent. That amounts to 2.3 months supply for Single-Family homes and 3.0 months supply for Condos.

Quick Facts

+ 24.3%	+ 7.6%	+ 6.6%
Price Range With Strongest Pending Sales:	Home Size With Strongest Pending Sales:	Property Type With Strongest Pending Sales:
\$2,000,001 to \$5,000,000	3,001 to 4,000 Sq Ft	Single-Family Homes

Residential real estate activity in San Diego County, comprised of single family properties, townhomes and condominiums. Percent changes are calculated using rounded figures.

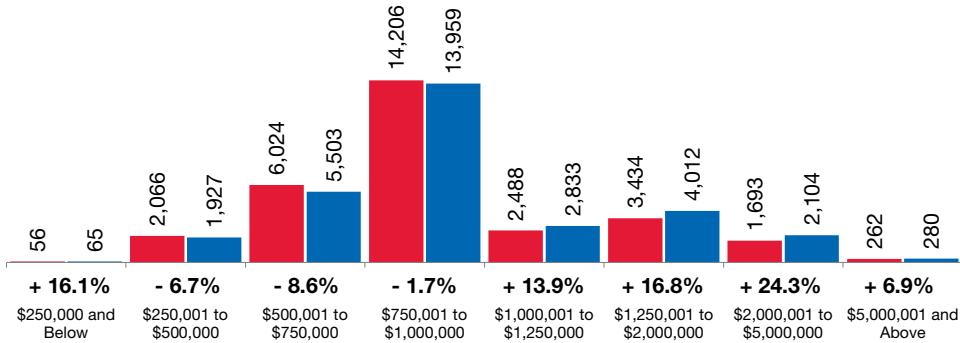
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Pending Sales

A count of properties on which offers have been accepted. **Based on a rolling 12-month calculation.**

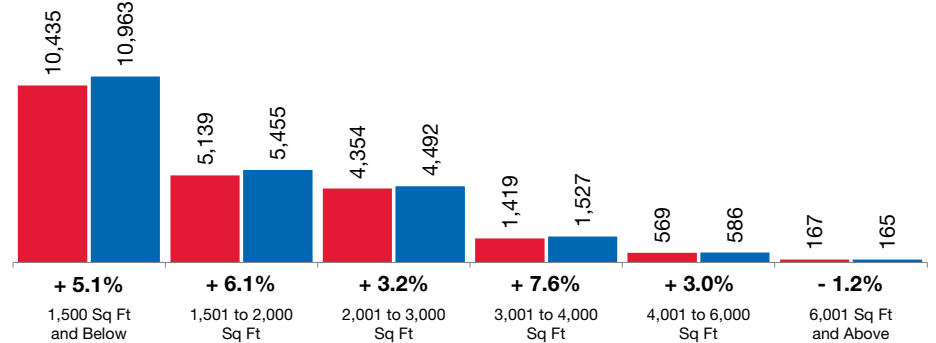
By Price Range

■ 03-2024 ■ 03-2025



By Square Feet

■ 03-2024 ■ 03-2025



All Properties

By Price Range	03-2024	03-2025	Change
\$250,000 and Below	56	65	+ 16.1%
\$250,001 to \$500,000	2,066	1,927	- 6.7%
\$500,001 to \$750,000	6,024	5,503	- 8.6%
\$750,001 to \$1,000,000	14,206	13,959	- 1.7%
\$1,000,001 to \$1,250,000	2,488	2,833	+ 13.9%
\$1,250,001 to \$2,000,000	3,434	4,012	+ 16.8%
\$2,000,001 to \$5,000,000	1,693	2,104	+ 24.3%
\$5,000,001 and Above	262	280	+ 6.9%
All Price Ranges	22,083	23,188	+ 5.0%

Single-Family Homes

03-2024	03-2025	Change	03-2024	03-2025	Change
30	31	+ 3.3%	26	34	+ 30.8%
246	203	- 17.5%	1,820	1,724	- 5.3%
2,632	2,152	- 18.2%	3,392	3,351	- 1.2%
7,448	7,161	- 3.9%	6,758	6,798	+ 0.6%
1,985	2,295	+ 15.6%	503	538	+ 7.0%
2,838	3,356	+ 18.3%	596	656	+ 10.1%
1,463	1,829	+ 25.0%	230	275	+ 19.6%
253	271	+ 7.1%	9	9	0.0%
13,987	14,912	+ 6.6%	8,096	8,276	+ 2.2%

Condos - Townhomes

By Square Feet	03-2024	03-2025	Change
1,500 Sq Ft and Below	10,435	10,963	+ 5.1%
1,501 to 2,000 Sq Ft	5,139	5,455	+ 6.1%
2,001 to 3,000 Sq Ft	4,354	4,492	+ 3.2%
3,001 to 4,000 Sq Ft	1,419	1,527	+ 7.6%
4,001 to 6,000 Sq Ft	569	586	+ 3.0%
6,001 Sq Ft and Above	167	165	- 1.2%
All Square Footage	22,083	23,188	+ 5.0%

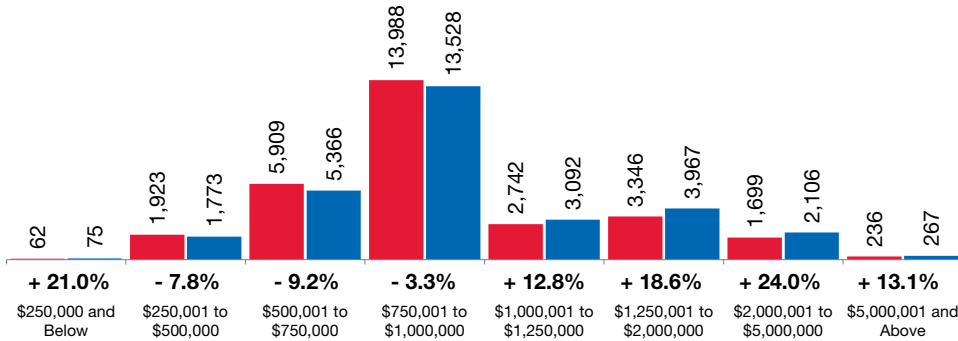
03-2024	03-2025	Change	03-2024	03-2025	Change
4,201	4,625	+ 10.1%	6,234	6,338	+ 1.7%
3,697	3,943	+ 6.7%	1,442	1,512	+ 4.9%
3,984	4,112	+ 3.2%	370	380	+ 2.7%
1,382	1,494	+ 8.1%	37	33	- 10.8%
556	575	+ 3.4%	13	11	- 15.4%
167	163	- 2.4%	0	2	--
13,987	14,912	+ 6.6%	8,096	8,276	+ 2.2%

Closed Sales

A count of the actual sales that have closed in a given month. **Based on a rolling 12-month calculation.**

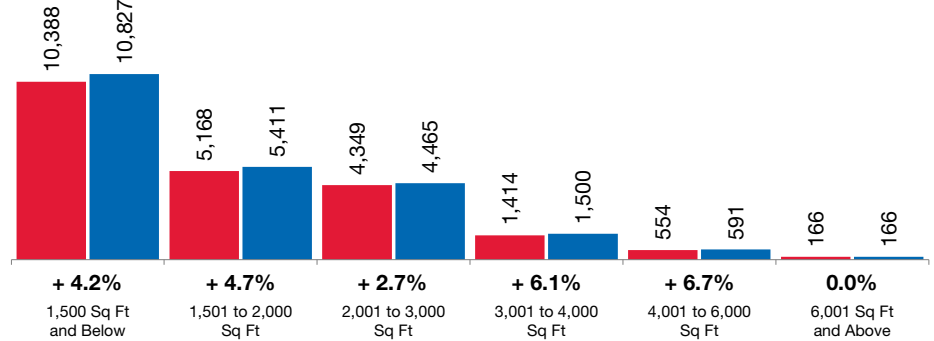
By Price Range

■ 03-2024 ■ 03-2025



By Square Feet

■ 03-2024 ■ 03-2025



All Properties

By Price Range	03-2024	03-2025	Change
\$250,000 and Below	62	75	+ 21.0%
\$250,001 to \$500,000	1,923	1,773	- 7.8%
\$500,001 to \$750,000	5,909	5,366	- 9.2%
\$750,001 to \$1,000,000	13,988	13,528	- 3.3%
\$1,000,001 to \$1,250,000	2,742	3,092	+ 12.8%
\$1,250,001 to \$2,000,000	3,346	3,967	+ 18.6%
\$2,000,001 to \$5,000,000	1,699	2,106	+ 24.0%
\$5,000,001 and Above	236	267	+ 13.1%
All Price Ranges	22,011	22,960	+ 4.3%

Single-Family Homes

03-2024	03-2025	Change	03-2024	03-2025	Change
34	36	+ 5.9%	28	39	+ 39.3%
210	203	- 3.3%	1,713	1,570	- 8.3%
2,448	1,977	- 19.2%	3,461	3,389	- 2.1%
7,216	6,870	- 4.8%	6,772	6,658	- 1.7%
2,203	2,511	+ 14.0%	539	581	+ 7.8%
2,777	3,317	+ 19.4%	569	650	+ 14.2%
1,477	1,844	+ 24.8%	222	262	+ 18.0%
229	261	+ 14.0%	7	6	- 14.3%
13,902	14,803	+ 6.5%	8,109	8,157	+ 0.6%

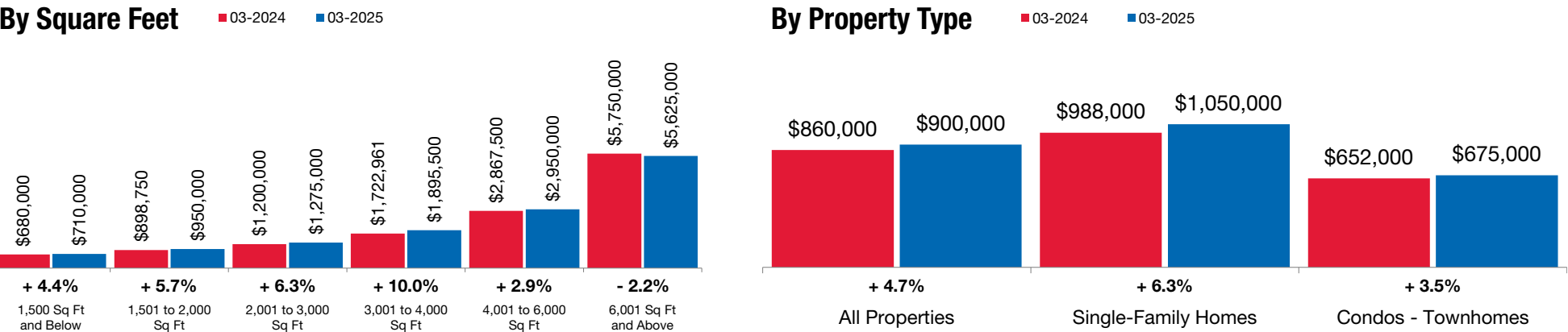
Condos - Townhomes

By Square Feet	03-2024	03-2025	Change
1,500 Sq Ft and Below	10,388	10,827	+ 4.2%
1,501 to 2,000 Sq Ft	5,168	5,411	+ 4.7%
2,001 to 3,000 Sq Ft	4,349	4,465	+ 2.7%
3,001 to 4,000 Sq Ft	1,414	1,500	+ 6.1%
4,001 to 6,000 Sq Ft	554	591	+ 6.7%
6,001 Sq Ft and Above	166	166	0.0%
All Square Footage	22,011	22,960	+ 4.3%

03-2024	03-2025	Change	03-2024	03-2025	Change
4,156	4,598	+ 10.6%	6,232	6,229	- 0.0%
3,709	3,910	+ 5.4%	1,459	1,501	+ 2.9%
3,949	4,087	+ 3.5%	371	378	+ 1.9%
1,378	1,463	+ 6.2%	36	37	+ 2.8%
543	580	+ 6.8%	11	11	0.0%
166	165	- 0.6%	0	1	--
13,902	14,803	+ 6.5%	8,109	8,157	+ 0.6%

Median Sales Price

Point at which half of the sales sold for more and half sold for less, not accounting for seller concessions, in a given month. **Based on a rolling 12-month median.**



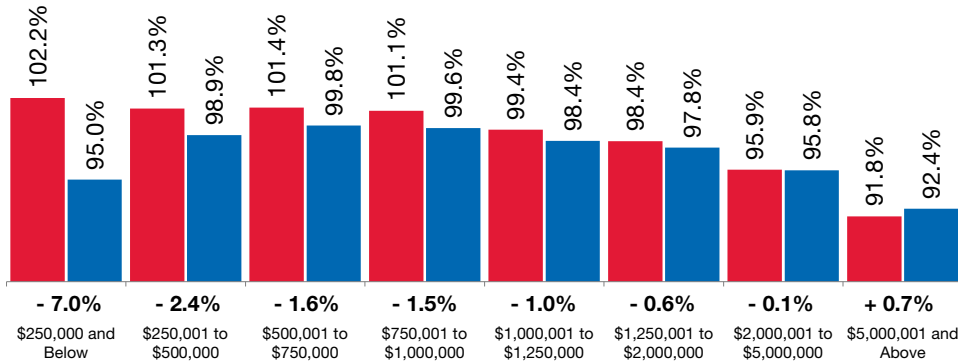
By Square Feet	All Properties			Single-Family Homes			Condos - Townhomes		
	03-2024	03-2025	Change	03-2024	03-2025	Change	03-2024	03-2025	Change
1,500 Sq Ft and Below	\$680,000	\$710,000	+ 4.4%	\$768,000	\$800,000	+ 4.2%	\$599,900	\$613,675	+ 2.3%
1,501 to 2,000 Sq Ft	\$898,750	\$950,000	+ 5.7%	\$900,000	\$962,500	+ 6.9%	\$880,000	\$900,000	+ 2.3%
2,001 to 3,000 Sq Ft	\$1,200,000	\$1,275,000	+ 6.3%	\$1,180,000	\$1,250,560	+ 6.0%	\$1,380,000	\$1,525,000	+ 10.5%
3,001 to 4,000 Sq Ft	\$1,722,961	\$1,895,500	+ 10.0%	\$1,710,000	\$1,880,000	+ 9.9%	\$2,175,000	\$2,500,000	+ 14.9%
4,001 to 6,000 Sq Ft	\$2,867,500	\$2,950,000	+ 2.9%	\$2,850,000	\$2,937,500	+ 3.1%	\$4,030,000	\$3,799,000	- 5.7%
6,001 Sq Ft and Above	\$5,750,000	\$5,625,000	- 2.2%	\$5,750,000	\$5,650,000	- 1.7%	--	\$2,250,000	--
All Square Footage	\$860,000	\$900,000	+ 4.7%	\$988,000	\$1,050,000	+ 6.3%	\$652,000	\$675,000	+ 3.5%

Percent of Original List Price Received

Percentage found when dividing a property's sales price by its original list price, then taking the average for all properties sold, in a given month, not accounting for seller concessions. **Based on a rolling 12-month average.**

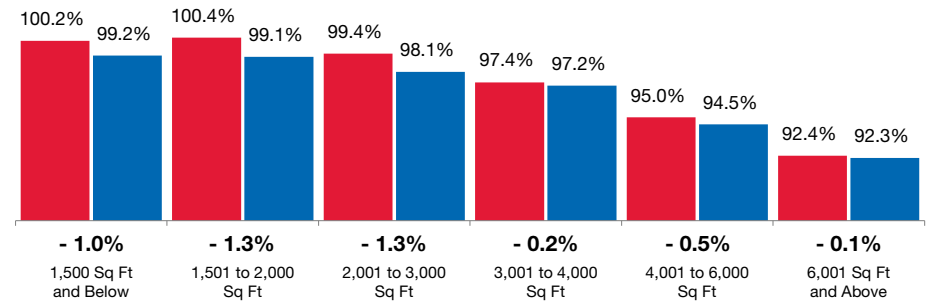
By Price Range

■ 03-2024 ■ 03-2025



By Square Feet

■ 03-2024 ■ 03-2025



All Properties

By Price Range	03-2024	03-2025	Change
\$250,000 and Below	102.2%	95.0%	- 7.0%
\$250,001 to \$500,000	101.3%	98.9%	- 2.4%
\$500,001 to \$750,000	101.4%	99.8%	- 1.6%
\$750,001 to \$1,000,000	101.1%	99.6%	- 1.5%
\$1,000,001 to \$1,250,000	99.4%	98.4%	- 1.0%
\$1,250,001 to \$2,000,000	98.4%	97.8%	- 0.6%
\$2,000,001 to \$5,000,000	95.9%	95.8%	- 0.1%
\$5,000,001 and Above	91.8%	92.4%	+ 0.7%
All Price Ranges	100.0%	98.7%	- 1.3%

Single-Family Homes

03-2024	03-2025	Change
101.8%	92.5%	- 9.1%
101.6%	100.2%	- 1.4%
102.3%	100.8%	- 1.5%
101.5%	100.2%	- 1.3%
99.7%	98.5%	- 1.2%
98.7%	98.0%	- 0.7%
96.1%	96.0%	- 0.1%
91.8%	92.4%	+ 0.7%
99.9%	98.8%	- 1.1%

Condos - Townhomes

03-2024	03-2025	Change
102.7%	97.5%	- 5.1%
101.3%	98.8%	- 2.5%
100.7%	99.1%	- 1.6%
100.7%	98.9%	- 1.8%
98.4%	98.1%	- 0.3%
96.9%	97.0%	+ 0.1%
94.8%	94.6%	- 0.2%
89.9%	95.3%	+ 6.0%
100.1%	98.5%	- 1.6%

By Square Feet

03-2024	03-2025	Change
100.2%	99.2%	- 1.0%
100.4%	99.1%	- 1.3%
99.4%	98.1%	- 1.3%
97.4%	97.2%	- 0.2%
95.0%	94.5%	- 0.5%
92.4%	92.3%	- 0.1%
100.0%	98.7%	- 1.3%

03-2024	03-2025	Change
101.3%	99.9%	- 1.4%
100.8%	99.4%	- 1.4%
99.5%	98.2%	- 1.3%
97.5%	97.3%	- 0.2%
95.1%	94.6%	- 0.5%
92.4%	92.4%	0.0%
99.9%	98.8%	- 1.1%

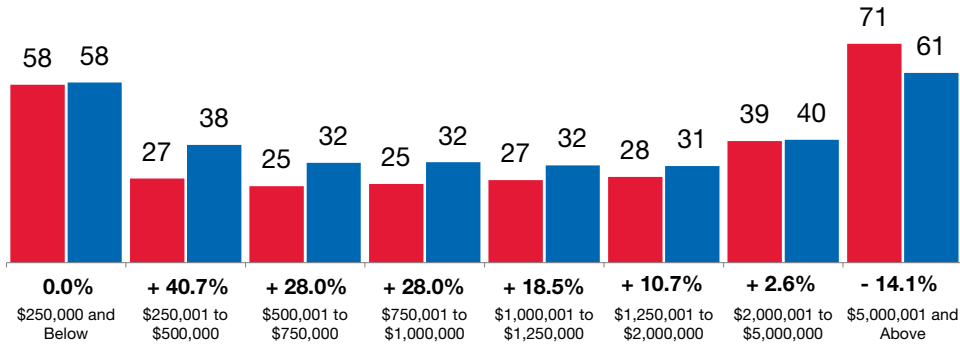
03-2024	03-2025	Change
100.4%	98.7%	- 1.7%
99.5%	98.4%	- 1.1%
97.8%	97.3%	- 0.5%
94.7%	92.1%	- 2.7%
90.6%	92.6%	+ 2.2%
--	77.6%	--
100.1%	98.5%	- 1.6%

Days on Market Until Sale

Average number of days between when a property is listed and when an offer is accepted, in a given month.
Based on a rolling 12-month average.

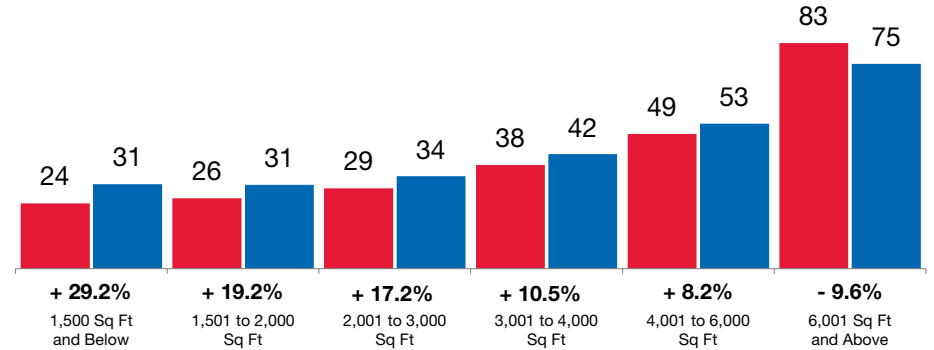
By Price Range

■ 03-2024 ■ 03-2025



By Square Feet

■ 03-2024 ■ 03-2025



All Properties

By Price Range	03-2024	03-2025	Change
\$250,000 and Below	58	58	0.0%
\$250,001 to \$500,000	27	38	+ 40.7%
\$500,001 to \$750,000	25	32	+ 28.0%
\$750,001 to \$1,000,000	25	32	+ 28.0%
\$1,000,001 to \$1,250,000	27	32	+ 18.5%
\$1,250,001 to \$2,000,000	28	31	+ 10.7%
\$2,000,001 to \$5,000,000	39	40	+ 2.6%
\$5,000,001 and Above	71	61	- 14.1%
All Price Ranges	27	33	+ 22.2%

Single-Family Homes

03-2024	03-2025	Change	03-2024	03-2025	Change
73	62	- 15.1%	39	55	+ 41.0%
40	46	+ 15.0%	26	37	+ 42.3%
26	30	+ 15.4%	24	33	+ 37.5%
26	30	+ 15.4%	25	35	+ 40.0%
26	31	+ 19.2%	29	33	+ 13.8%
27	31	+ 14.8%	30	34	+ 13.3%
38	39	+ 2.6%	47	49	+ 4.3%
72	62	- 13.9%	51	33	- 35.3%
28	32	+ 14.3%	26	35	+ 34.6%

Condos - Townhomes

By Square Feet	03-2024	03-2025	Change
1,500 Sq Ft and Below	24	31	+ 29.2%
1,501 to 2,000 Sq Ft	26	31	+ 19.2%
2,001 to 3,000 Sq Ft	29	34	+ 17.2%
3,001 to 4,000 Sq Ft	38	42	+ 10.5%
4,001 to 6,000 Sq Ft	49	53	+ 8.2%
6,001 Sq Ft and Above	83	75	- 9.6%
All Square Footage	27	33	+ 22.2%

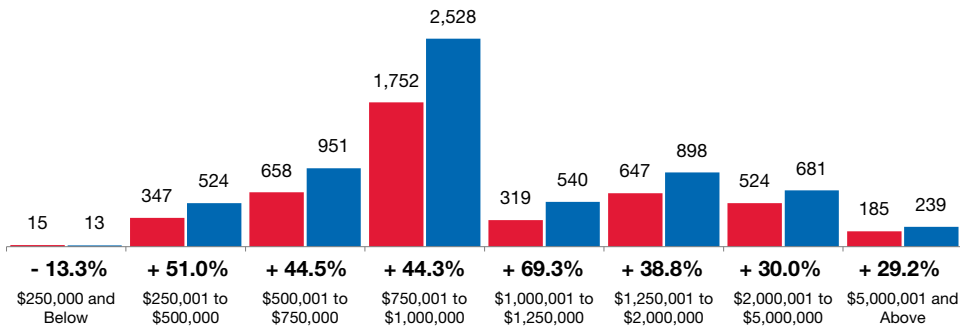
03-2024	03-2025	Change	03-2024	03-2025	Change
23	28	+ 21.7%	25	34	+ 36.0%
25	28	+ 12.0%	28	38	+ 35.7%
29	33	+ 13.8%	38	40	+ 5.3%
38	41	+ 7.9%	40	66	+ 65.0%
48	53	+ 10.4%	134	55	- 59.0%
83	75	- 9.6%	--	142	--
28	32	+ 14.3%	26	35	+ 34.6%

Inventory of Homes for Sale

The number of properties available for sale in active status at the end of a given month.
Based on one month of activity.

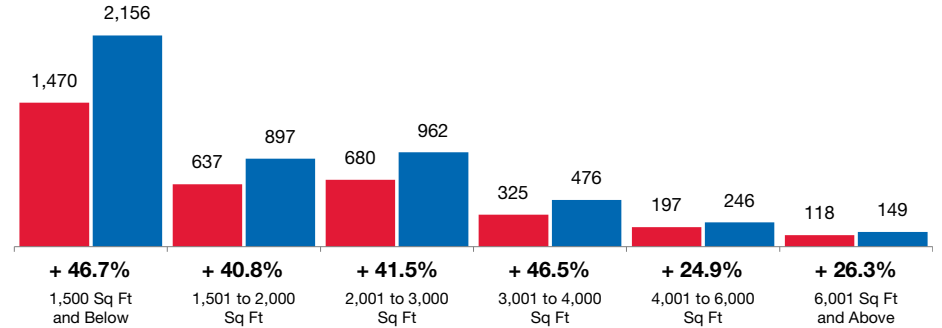
By Price Range

■ 03-2024 ■ 03-2025



By Square Feet

■ 03-2024 ■ 03-2025



All Properties

By Price Range	03-2024	03-2025	Change
\$250,000 and Below	15	13	- 13.3%
\$250,001 to \$500,000	347	524	+ 51.0%
\$500,001 to \$750,000	658	951	+ 44.5%
\$750,001 to \$1,000,000	1,752	2,528	+ 44.3%
\$1,000,001 to \$1,250,000	319	540	+ 69.3%
\$1,250,001 to \$2,000,000	647	898	+ 38.8%
\$2,000,001 to \$5,000,000	524	681	+ 30.0%
\$5,000,001 and Above	185	239	+ 29.2%
All Price Ranges	3,427	4,886	+ 42.6%

By Square Feet	03-2024	03-2025	Change
1,500 Sq Ft and Below	1,470	2,156	+ 46.7%
1,501 to 2,000 Sq Ft	637	897	+ 40.8%
2,001 to 3,000 Sq Ft	680	962	+ 41.5%
3,001 to 4,000 Sq Ft	325	476	+ 46.5%
4,001 to 6,000 Sq Ft	197	246	+ 24.9%
6,001 Sq Ft and Above	118	149	+ 26.3%
All Square Footage	3,427	4,886	+ 42.6%

Single-Family Homes

03-2024	03-2025	Change
6	6	0.0%
39	48	+ 23.1%
233	211	- 9.4%
783	921	+ 17.6%
255	401	+ 57.3%
470	717	+ 52.6%
450	532	+ 18.2%
175	233	+ 33.1%
2,133	2,804	+ 31.5%

Condos - Townhomes

03-2024	03-2025	Change
9	7	- 22.2%
308	476	+ 54.5%
425	740	+ 74.1%
969	1,607	+ 65.8%
64	139	+ 117.2%
177	181	+ 2.3%
74	149	+ 101.4%
10	6	- 40.0%
1,294	2,082	+ 60.9%

03-2024	03-2025	Change
527	587	+ 11.4%
398	529	+ 32.9%
591	846	+ 43.1%
311	454	+ 46.0%
189	241	+ 27.5%
117	147	+ 25.6%
2,133	2,804	+ 31.5%

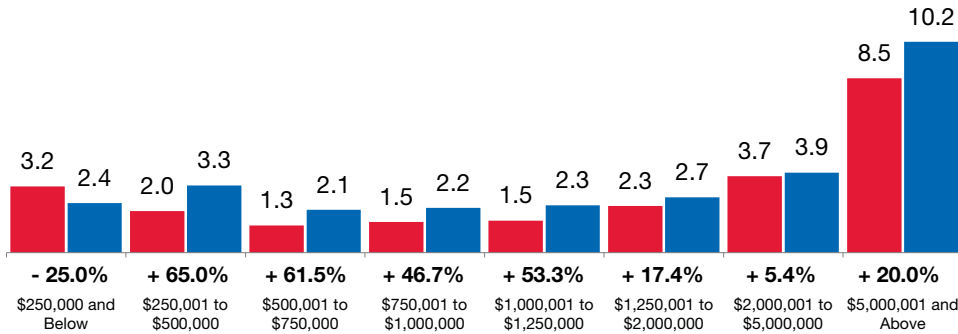
03-2024	03-2025	Change
943	1,569	+ 66.4%
239	368	+ 54.0%
89	116	+ 30.3%
14	22	+ 57.1%
8	5	- 37.5%
1	2	+ 100.0%
1,294	2,082	+ 60.9%

Months Supply of Inventory

The inventory of homes for sale at the end of the most recent month, **based on one month of activity**, divided by the average monthly pending sales from the last 12 months.

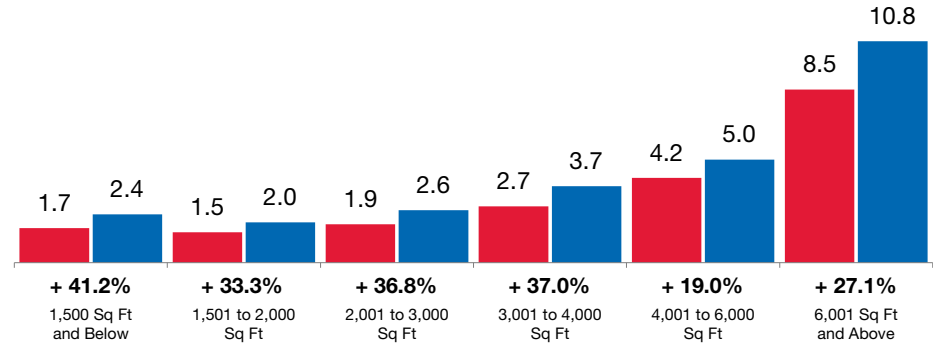
By Price Range

■ 03-2024 ■ 03-2025



By Square Feet

■ 03-2024 ■ 03-2025



All Properties

By Price Range	03-2024	03-2025	Change
\$250,000 and Below	3.2	2.4	- 25.0%
\$250,001 to \$500,000	2.0	3.3	+ 65.0%
\$500,001 to \$750,000	1.3	2.1	+ 61.5%
\$750,001 to \$1,000,000	1.5	2.2	+ 46.7%
\$1,000,001 to \$1,250,000	1.5	2.3	+ 53.3%
\$1,250,001 to \$2,000,000	2.3	2.7	+ 17.4%
\$2,000,001 to \$5,000,000	3.7	3.9	+ 5.4%
\$5,000,001 and Above	8.5	10.2	+ 20.0%
All Price Ranges	1.9	2.5	+ 31.6%

Single-Family Homes

03-2024	03-2025	Change	03-2024	03-2025	Change
2.2	2.3	+ 4.5%	3.5	2.1	- 40.0%
1.9	2.8	+ 47.4%	2.0	3.3	+ 65.0%
1.1	1.2	+ 9.1%	1.5	2.6	+ 73.3%
1.3	1.5	+ 15.4%	1.7	2.8	+ 64.7%
1.5	2.1	+ 40.0%	1.5	3.1	+ 106.7%
2.0	2.6	+ 30.0%	3.6	3.3	- 8.3%
3.7	3.5	- 5.4%	3.9	6.5	+ 66.7%
8.3	10.3	+ 24.1%	6.7	4.7	- 29.9%
1.8	2.3	+ 27.8%	1.9	3.0	+ 57.9%

Condos - Townhomes

By Square Feet	03-2024	03-2025	Change
1,500 Sq Ft and Below	1.7	2.4	+ 41.2%
1,501 to 2,000 Sq Ft	1.5	2.0	+ 33.3%
2,001 to 3,000 Sq Ft	1.9	2.6	+ 36.8%
3,001 to 4,000 Sq Ft	2.7	3.7	+ 37.0%
4,001 to 6,000 Sq Ft	4.2	5.0	+ 19.0%
6,001 Sq Ft and Above	8.5	10.8	+ 27.1%
All Square Footage	1.9	2.5	+ 31.6%

03-2024	03-2025	Change	03-2024	03-2025	Change
1.5	1.5	0.0%	1.8	3.0	+ 66.7%
1.3	1.6	+ 23.1%	2.0	2.9	+ 45.0%
1.8	2.5	+ 38.9%	2.9	3.7	+ 27.6%
2.7	3.6	+ 33.3%	4.2	6.7	+ 59.5%
4.1	5.0	+ 22.0%	3.7	3.6	- 2.7%
8.4	10.8	+ 28.6%	--	2.0	--
1.8	2.3	+ 27.8%	1.9	3.0	+ 57.9%