

# DAAR LOUDOUN COUNTY

## MARKET INDICATORS REPORT

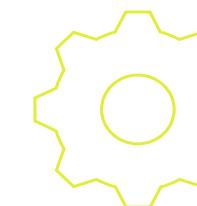
CUSTOM REPORT PREPARED BY  
**VIRGINIA REALTORS®**

# DAAR Market Indicators Report



## Key Market Trends: December 2025

- Home sales in Loudoun County increased in the final month of 2025. There were 404 sales in the county, 12 more than last year, a rise of 3.1%. Activity increased in Leesburg zip code 20175 with 12 additional transactions (+33.3%) and in Sterling zip code 20164, which had eight more sales than the year before (+32.0%). Lovettsville zip code 20180 experienced the biggest decline this month, with nine fewer sales than last year (-69.2%). Sales activity also fell in Chantilly zip code 20152 with seven fewer transactions than a year ago (-26.9%).
- After increasing for the last two months, pending sales dipped across the region. The total number of pending sales came to 231 in December, a decrease of 7.2% or 18 fewer pending sales compared to the previous year. The areas with the sharpest increase in activity were Ashburn zip code 20148 with five additional pending transactions (+14.7%) and Aldie zip code 20105 with four more than the year before (+26.7%). Sterling zip code 20164 had nine fewer pending sales than last December (-34.6%), followed by Purcellville zip code 20132, which was down seven from the previous year (-38.9%).
- There was a small uptick in sales price this month. Loudoun County's median sales price inched up 0.5% to \$739,847 in December, \$3,581 more than the previous year. Homes in Aldie zip code 20105 sold for \$955,000, a 4.7% increase, which is \$45,000 more than last year. Prices have fallen for the sixth consecutive month in Leesburg zip code 20175, with homes costing \$240,500 less than a year ago (-23.2%). Purcellville zip code 20132 saw a \$55,000 decrease in sales price in the last month of 2025 (-5.9%).
- The number of active listings continued to grow in Loudoun County. The year ended with 348 total listings in December, up 17.2% from a year earlier, adding 51 listings. Listings climbed in Aldie zip code 20105 with nine more than last year (+56.3%) and in Sterling zip code 20164 with seven additional listings (+38.9%). Ashburn zip code 20148 (-43.5%) and Purcellville zip code 20132 (-52.2%) saw significant reductions in listing activity this month.



## DAAR Market Dashboard

YoY Chg	Dec-25	Indicator
▲ 3.1%	404	Sales
▼ -7.2%	231	Pending Sales
▼ -5.4%	263	New Listings
▲ 1.9%	\$748,375	Median List Price
▲ 0.5%	\$739,847	Median Sales Price
▲ 0.3%	\$295	Median Price Per Square Foot
▲ 7.9%	\$354.2	Sold Dollar Volume (in millions)
▼ -1.5%	99.5%	Average Sold/Ask Price Ratio
▲ 76.4%	33	Average Days on Market
▲ 17.2%	348	Active Listings
▲ 11.0%	0.8	Months of Supply

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## **Consumers Should Consult with a REALTOR®.**

Buying or selling real estate, for a majority of consumers, is one of the most important decisions they will make. Choosing a real estate professional continues to be a vital part of this process.

## **Identify a Professional to Manage the Procedure.**

REALTORS® are well-informed about critical factors that affect your specific market area – such as changes in market conditions, consumer attitudes and interest rates.

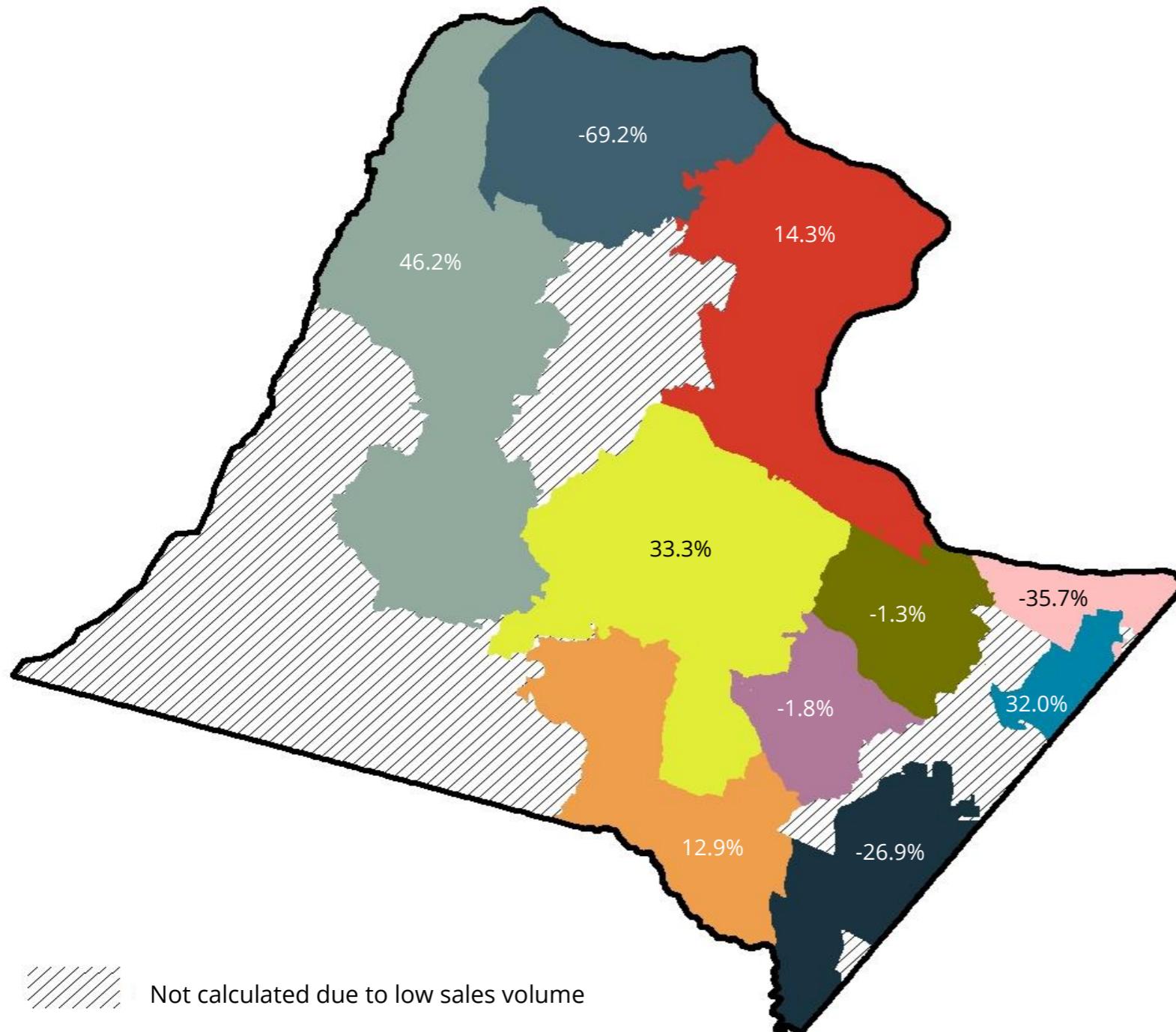
## **Are You Ready to Buy or Sell Real Estate?**

Contact an experienced REALTOR®.

**Data Note:** The housing market data for all jurisdictions in Virginia was re-benchmarked in November 2021. Please note that Market Indicator Reports released prior to November 2021 were produced using the prior data vintage and may not tie to reports that use the current data set for some metrics. We recommend using the current reports for historical comparative analysis.



# Market Activity - DAAR Footprint



Zip Code	Home Sales		
	Dec-24	Dec-25	% Chg
20105			
Aldie	31	35	12.9%
20132			
Purcellville	13	19	46.2%
20147			
Ashburn	78	77	-1.3%
20148			
Ashburn	56	55	-1.8%
20152			
Chantilly	26	19	-26.9%
20164			
Sterling	25	33	32.0%
20165			
Sterling	28	18	-35.7%
20175			
Leesburg	36	48	33.3%
20176			
Leesburg	49	56	14.3%
20180			
Lovettsville	13	4	-69.2%

# Total Market Overview



Key Metrics	2-year Trends			Dec-24	Dec-25	YoY Chg	2024 YTD	2025 YTD	YoY Chg
	Dec-23	2023	2024						
Sales		392	<b>404</b>	3.1%	4,945	<b>5,240</b>	6.0%		
Pending Sales		249	<b>231</b>	-7.2%	4,958	<b>5,202</b>	4.9%		
New Listings		278	<b>263</b>	-5.4%	6,555	<b>7,387</b>	12.7%		
Median List Price		\$734,448	<b>\$748,375</b>	1.9%	\$729,752	<b>\$765,000</b>	4.8%		
Median Sales Price		\$736,267	<b>\$739,847</b>	0.5%	\$739,945	<b>\$765,000</b>	3.4%		
Median Price Per Square Foot		\$294	<b>\$295</b>	0.3%	\$289	<b>\$292</b>	1.1%		
Sold Dollar Volume (in millions)		\$328.3	<b>\$354.2</b>	7.9%	\$3,997.4	<b>\$4,415.8</b>	10.5%		
Average Sold/Ask Price Ratio		101.0%	<b>99.5%</b>	-1.5%	101.2%	<b>100.3%</b>	-1.0%		
Average Days on Market		19	<b>33</b>	76.4%	18	<b>23</b>	27.2%		
Active Listings		297	<b>348</b>	17.2%	n/a	<b>n/a</b>	n/a		
Months of Supply		0.7	<b>0.8</b>	11.0%	n/a	<b>n/a</b>	n/a		

# Townhome & Condo Market Overview



Key Metrics	2-year Trends			Dec-24	Dec-25	YoY Chg	2024 YTD	2025 YTD	YoY Chg
	Dec-23	2023	2024						
Sales		222	<b>230</b>	3.6%	2,688	<b>2,718</b>	1.1%		
Pending Sales		152	<b>149</b>	-2.0%	2,702	<b>2,718</b>	0.6%		
New Listings		169	<b>170</b>	0.6%	3,487	<b>3,887</b>	11.5%		
Median List Price		\$624,950	<b>\$632,450</b>	1.2%	\$610,000	<b>\$619,000</b>	1.5%		
Median Sales Price		\$622,250	<b>\$630,000</b>	1.2%	\$615,000	<b>\$616,140</b>	0.2%		
Median Price Per Square Foot		\$302	<b>\$299</b>	-1.1%	\$298	<b>\$301</b>	0.9%		
Sold Dollar Volume (in millions)		\$139.9	<b>\$147.5</b>	5.4%	\$1,517.7	<b>\$1,563.0</b>	3.0%		
Average Sold/Ask Price Ratio		100.9%	<b>99.7%</b>	-1.1%	100.7%	<b>100.0%</b>	-0.7%		
Average Days on Market		19	<b>30</b>	54.1%	18	<b>22</b>	18.8%		
Active Listings		153	<b>200</b>	30.7%	n/a	<b>n/a</b>	n/a		
Months of Supply		0.7	<b>0.9</b>	29.1%	n/a	<b>n/a</b>	n/a		

# Single-Family Detached Market Overview

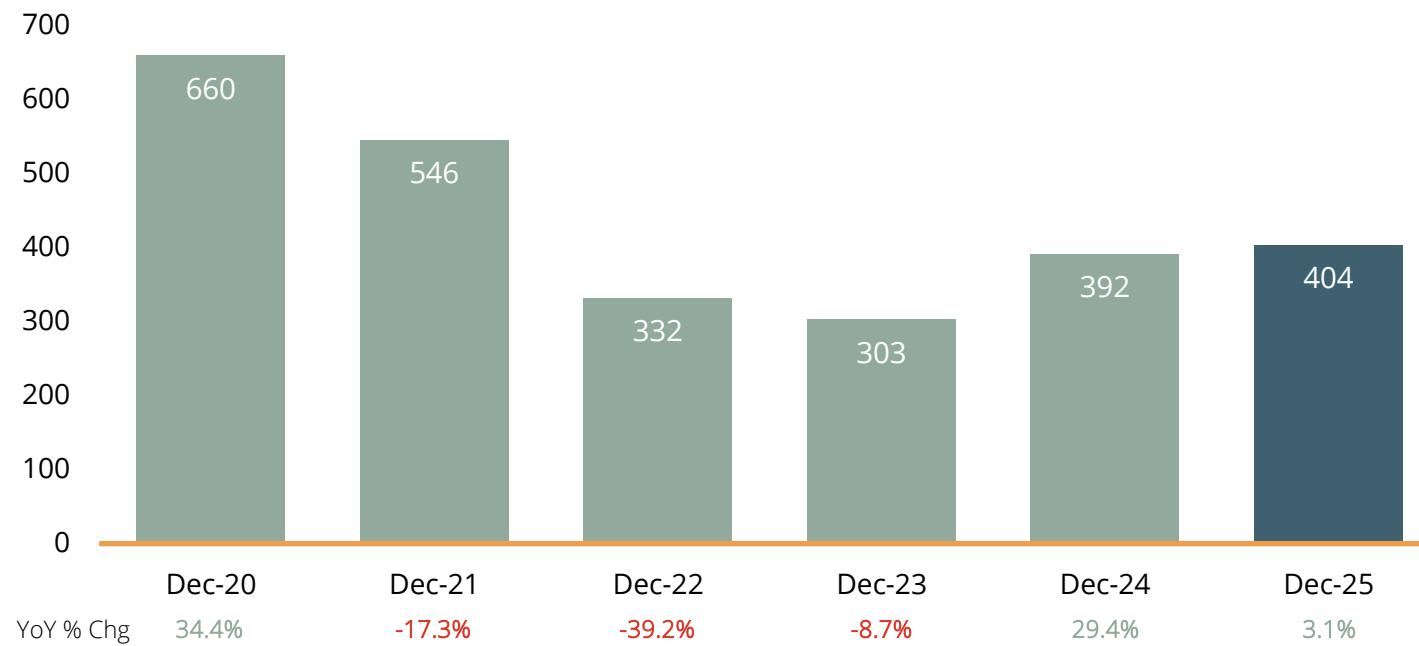


Key Metrics	2-year Trends			Dec-24	Dec-25	YoY Chg	2024 YTD	2025 YTD	YoY Chg
	Dec-23	2023	2024						
Sales		170	<b>174</b>	2.4%	2,257	<b>2,522</b>	11.7%		
Pending Sales		97	<b>82</b>	-15.5%	2,256	<b>2,484</b>	10.1%		
New Listings		109	<b>93</b>	-14.7%	3,068	<b>3,500</b>	14.1%		
Median List Price		\$1,050,000	<b>\$1,049,085</b>	-0.1%	\$989,000	<b>\$1,034,995</b>	4.7%		
Median Sales Price		\$1,085,792	<b>\$1,021,260</b>	-5.9%	\$1,000,000	<b>\$1,049,500</b>	5.0%		
Median Price Per Square Foot		\$277	<b>\$286</b>	3.0%	\$274	<b>\$279</b>	1.8%		
Sold Dollar Volume (in millions)		\$188.4	<b>\$206.7</b>	9.7%	\$2,479.7	<b>\$2,852.8</b>	15.0%		
Average Sold/Ask Price Ratio		101.3%	<b>99.2%</b>	-2.0%	101.8%	<b>100.5%</b>	-1.3%		
Average Days on Market		18	<b>37</b>	107.8%	17	<b>24</b>	37.5%		
Active Listings		144	<b>148</b>	2.8%	n/a	<b>n/a</b>	n/a		
Months of Supply		0.8	<b>3.7</b>	385.9%	n/a	<b>n/a</b>	n/a		

# Sales



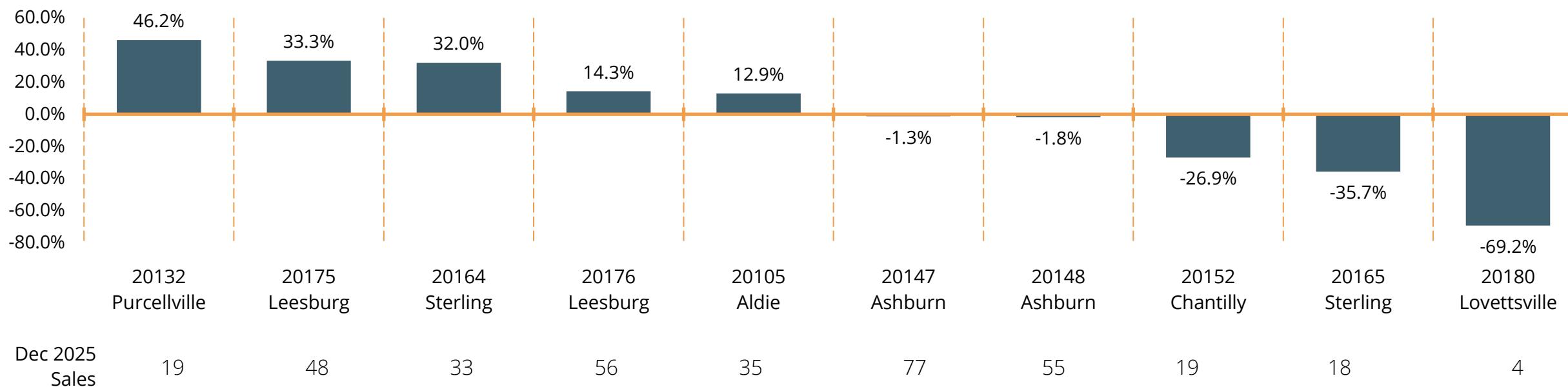
## Loudoun County



Month	Single-Family Detached	YoY Chg	Townhome & Condo	YoY Chg
Jan-25	113	20.2%	153	15.0%
Feb-25	131	20.2%	160	-2.4%
Mar-25	202	10.4%	204	9.7%
Apr-25	244	10.9%	243	3.8%
May-25	261	4.0%	259	6.6%
Jun-25	265	7.3%	263	-4.0%
Jul-25	259	10.2%	267	-5.7%
Aug-25	251	16.2%	273	9.6%
Sep-25	202	17.4%	214	-4.9%
Oct-25	238	17.8%	245	-7.9%
Nov-25	182	15.2%	207	-1.0%
Dec-25	174	2.4%	230	3.6%
12-month Avg	210	11.7%	227	1.1%

## Zip Code

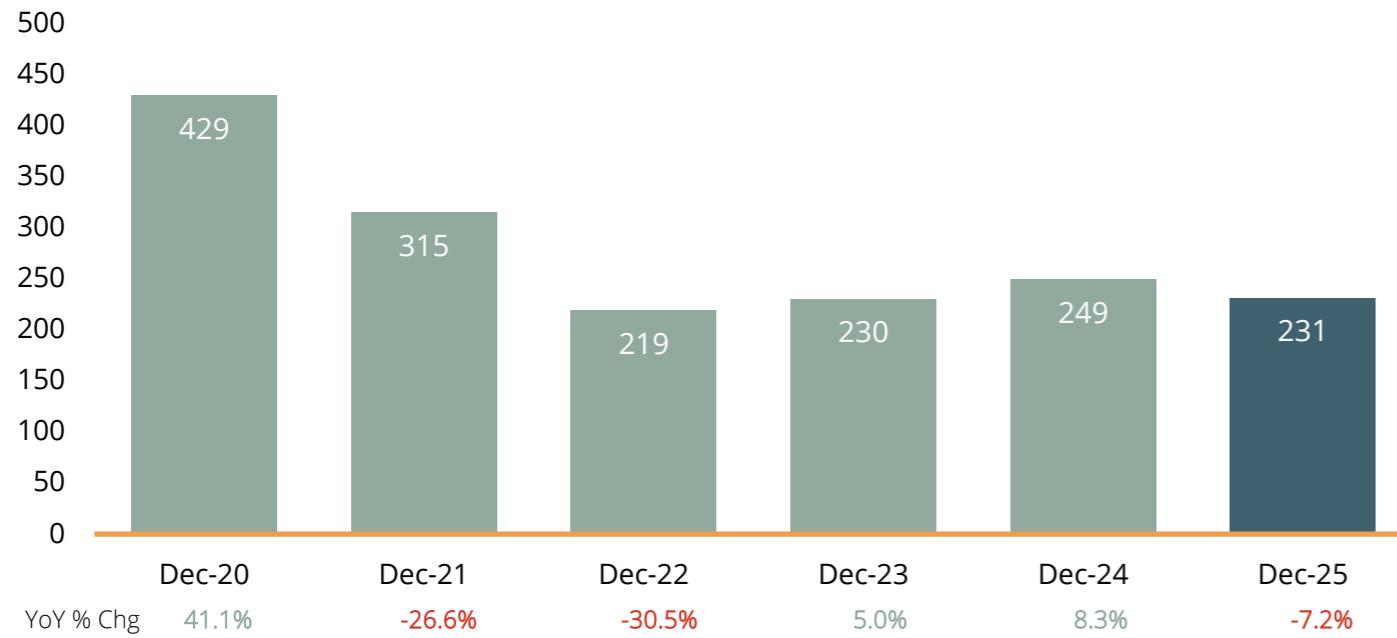
% Change in Sales  
Dec-24 to Dec-25



# Pending Sales



## Loudoun County

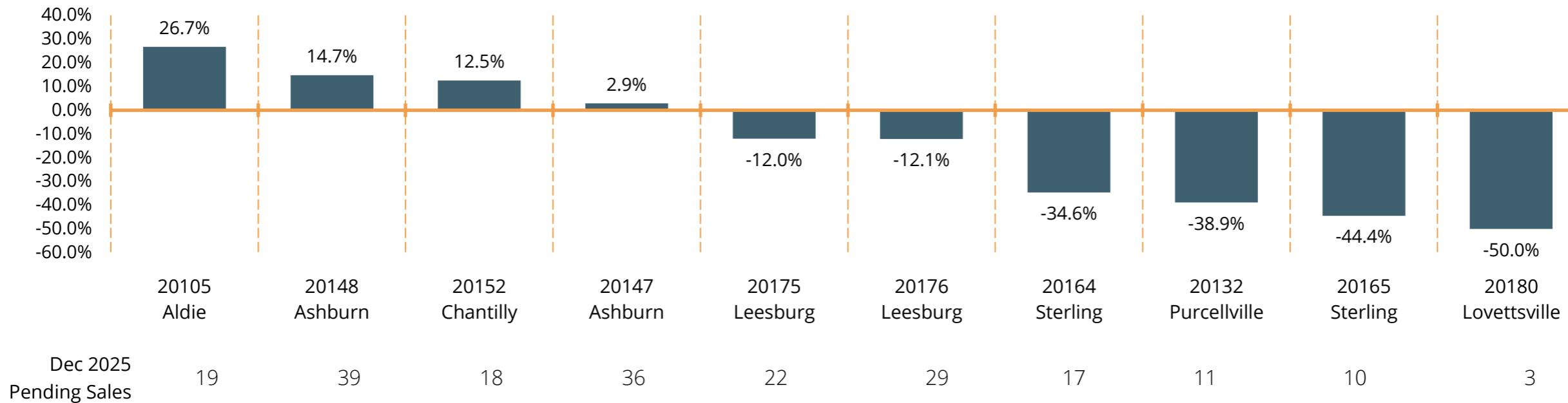


Month	Single-Family Detached	YoY Chg	Townhome & Condo	YoY Chg
Jan-25	<b>122</b>	2.5%	<b>142</b>	-21.1%
Feb-25	<b>183</b>	15.1%	<b>218</b>	19.1%
Mar-25	<b>262</b>	24.8%	<b>270</b>	20.0%
Apr-25	<b>252</b>	-4.2%	<b>263</b>	5.2%
May-25	<b>268</b>	19.6%	<b>241</b>	-16.3%
Jun-25	<b>242</b>	0.8%	<b>284</b>	8.0%
Jul-25	<b>242</b>	14.2%	<b>244</b>	-6.5%
Aug-25	<b>225</b>	21.6%	<b>247</b>	8.8%
Sep-25	<b>207</b>	-1.0%	<b>238</b>	-4.4%
Oct-25	<b>238</b>	28.6%	<b>217</b>	-10.7%
Nov-25	<b>161</b>	5.2%	<b>205</b>	13.3%
Dec-25	<b>82</b>	-15.5%	<b>149</b>	-2.0%
12-month Avg	207	10.1%	227	0.6%

## Zip Code

### % Change in Pending Sales

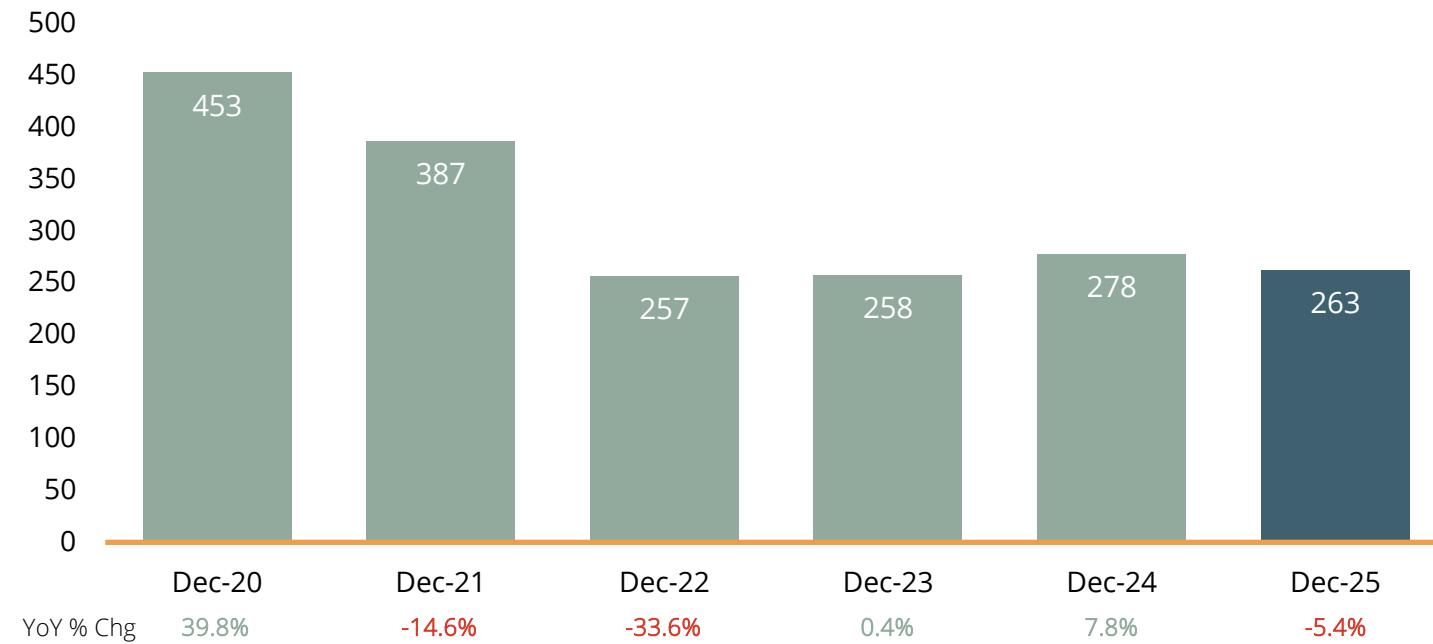
Dec-24 to Dec-25



# New Listings



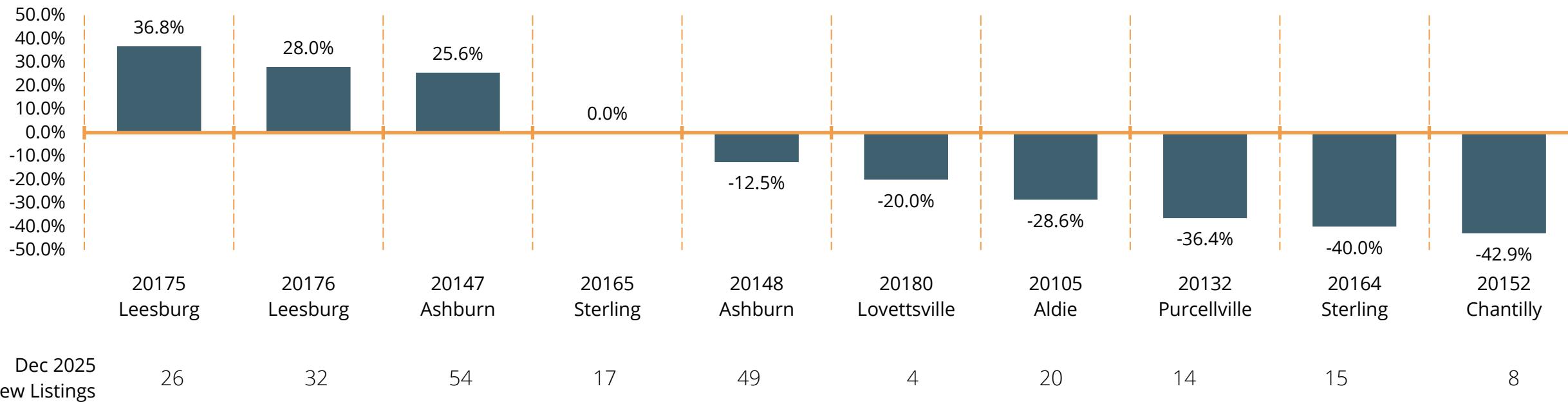
## Loudoun County



Month	Single-Family Detached	YoY Chg	Townhome & Condo	YoY Chg
Jan-25	<b>214</b>	22.3%	<b>237</b>	4.9%
Feb-25	<b>258</b>	24.6%	<b>296</b>	28.7%
Mar-25	<b>370</b>	41.2%	<b>356</b>	21.9%
Apr-25	<b>430</b>	22.9%	<b>387</b>	19.1%
May-25	<b>427</b>	19.6%	<b>445</b>	20.3%
Jun-25	<b>343</b>	6.9%	<b>381</b>	10.8%
Jul-25	<b>326</b>	17.3%	<b>369</b>	13.9%
Aug-25	<b>290</b>	10.7%	<b>313</b>	-5.7%
Sep-25	<b>313</b>	11.8%	<b>339</b>	-5.8%
Oct-25	<b>268</b>	2.3%	<b>357</b>	20.6%
Nov-25	<b>168</b>	-18.0%	<b>237</b>	8.2%
Dec-25	<b>93</b>	-14.7%	<b>170</b>	0.6%
12-month Avg	292	14.1%	324	11.5%

## Zip Code

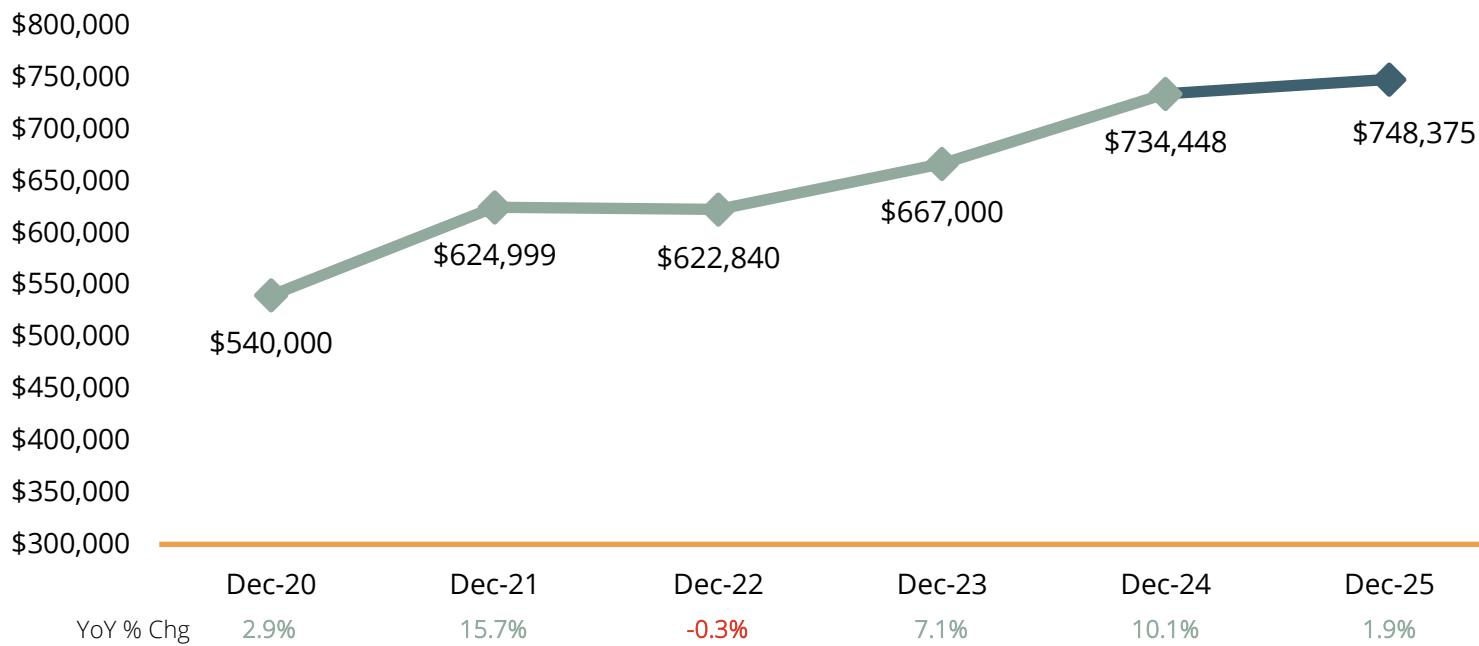
**% Change in New Listings**  
Dec-24 to Dec-25



# Median List Price



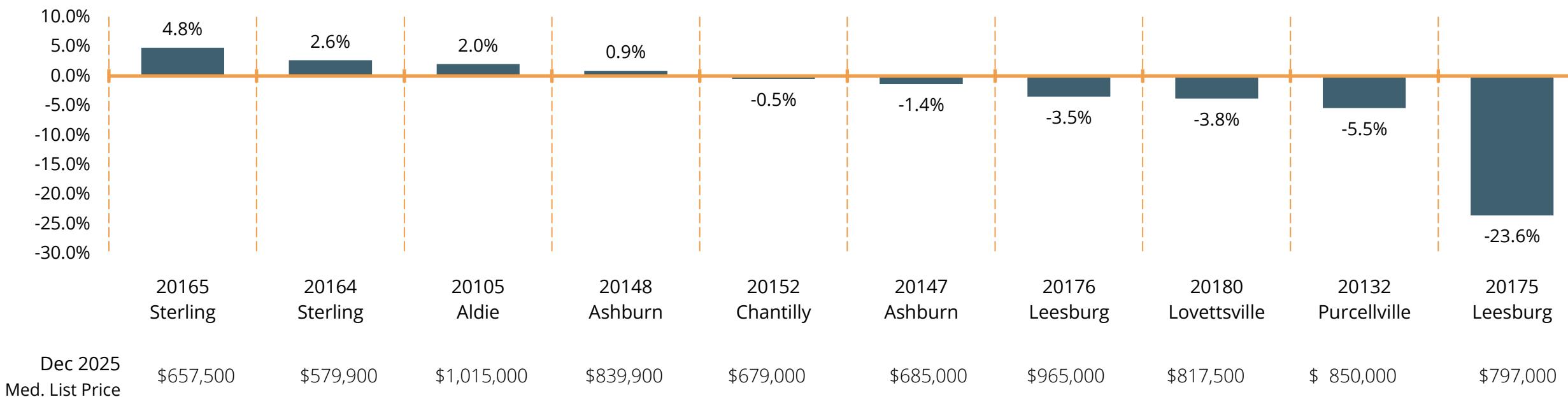
## Loudoun County



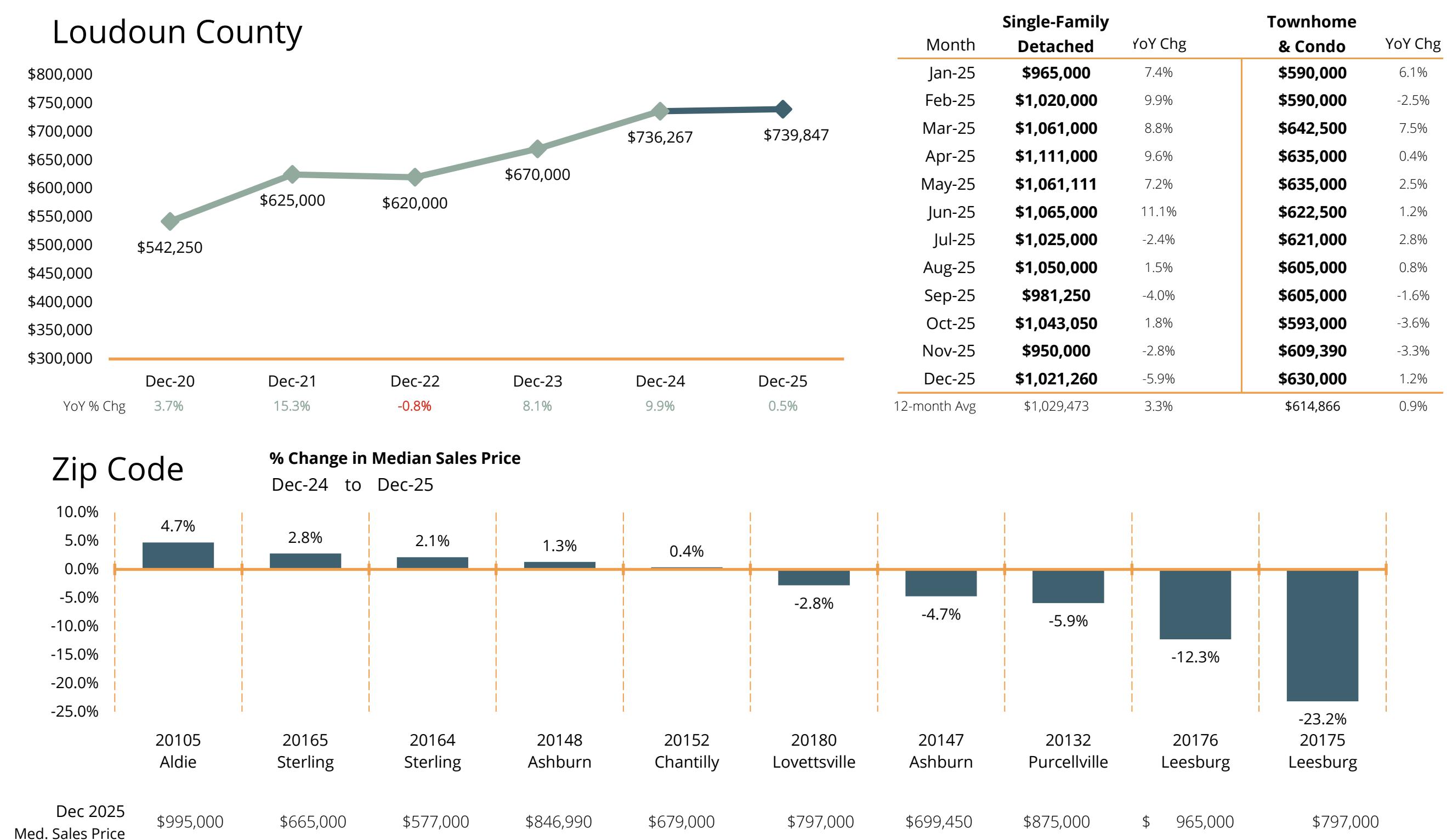
Month	Single-Family Detached	YoY Chg	Townhome & Condo	YoY Chg
Jan-25	\$957,000	6.1%	\$595,000	8.2%
Feb-25	\$999,000	8.0%	\$577,450	-2.1%
Mar-25	\$1,025,000	7.9%	\$640,000	8.3%
Apr-25	\$1,099,450	11.1%	\$632,000	1.1%
May-25	\$1,036,640	9.1%	\$629,900	2.4%
Jun-25	\$1,064,990	13.4%	\$619,900	0.8%
Jul-25	\$1,025,000	0.0%	\$619,990	4.4%
Aug-25	\$1,050,000	5.0%	\$599,990	-0.2%
Sep-25	\$985,000	-3.3%	\$612,000	-0.5%
Oct-25	\$1,049,950	5.0%	\$599,000	-3.4%
Nov-25	\$950,000	-2.8%	\$614,900	-1.6%
Dec-25	\$1,049,085	-0.1%	\$632,450	1.2%
12-month Avg	\$1,024,260	4.8%	\$614,382	1.5%

## Zip Code

% Change in Median List Price  
Dec-24 to Dec-25



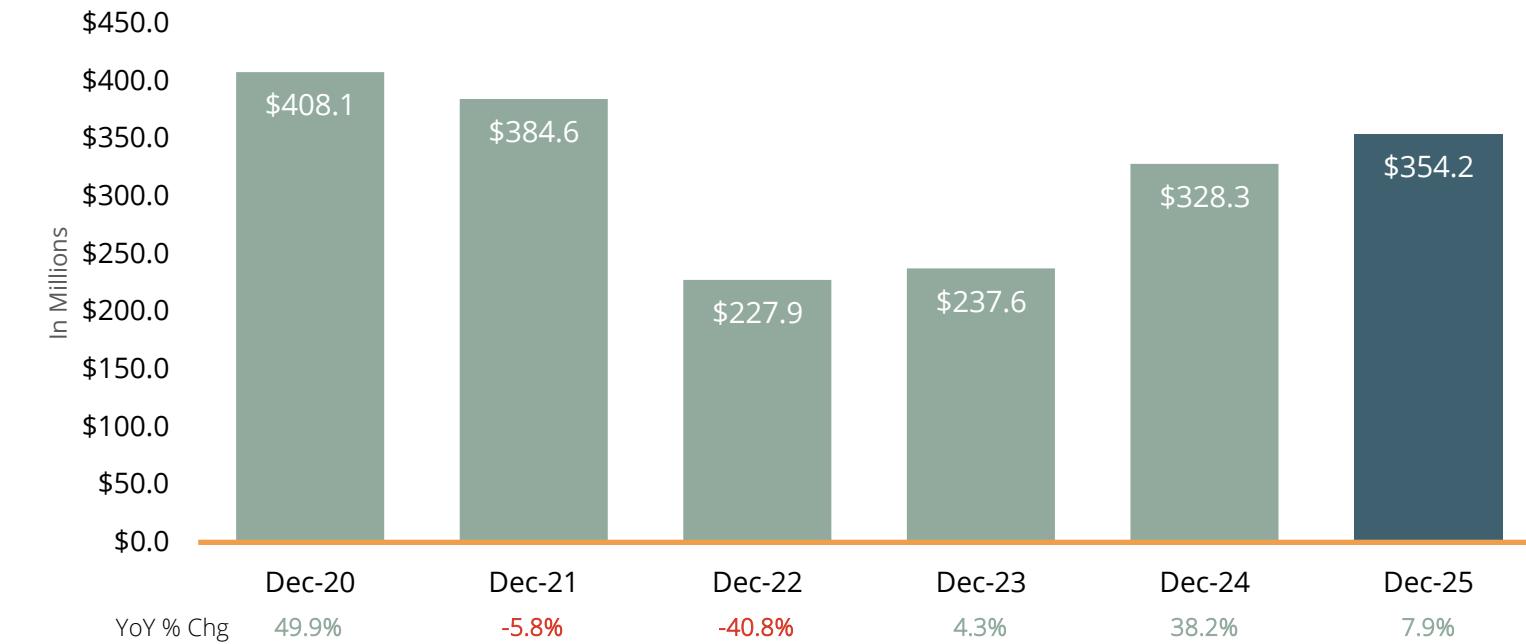
# Median Sales Price



# Sold Dollar Volume (in millions)

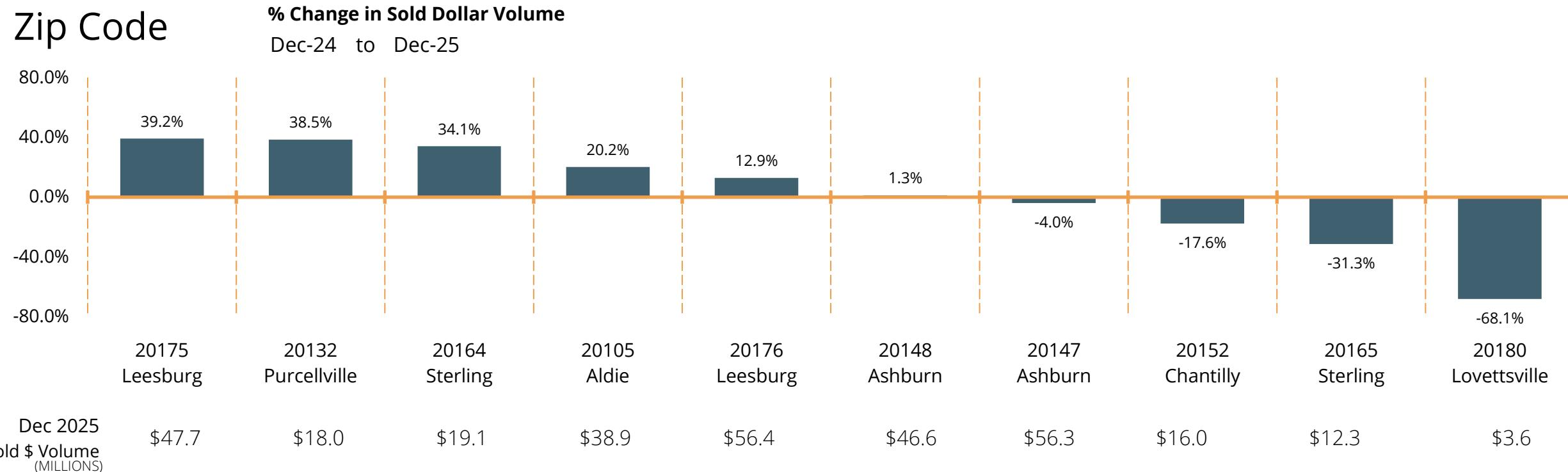


## Loudoun County



Month	Single-Family Detached	YoY Chg	Townhome & Condo	YoY Chg
Jan-25	\$121.6	26.7%	\$92.0	18.9%
Feb-25	\$148.7	35.6%	\$99.1	0.5%
Mar-25	\$228.1	16.4%	\$132.2	16.6%
Apr-25	\$291.5	23.1%	\$154.7	4.1%
May-25	\$291.3	6.9%	\$164.7	12.3%
Jun-25	\$301.0	14.6%	\$168.5	-0.6%
Jul-25	\$296.6	9.9%	\$168.7	-2.6%
Aug-25	\$279.2	18.6%	\$172.5	12.8%
Sep-25	\$222.3	17.8%	\$133.3	-3.7%
Oct-25	\$272.9	12.8%	\$147.6	-12.1%
Nov-25	\$192.9	6.1%	\$129.7	-0.9%
Dec-25	\$206.7	9.7%	\$147.5	5.4%
12-month Avg	\$237.7	15.0%	\$142.5	3.2%

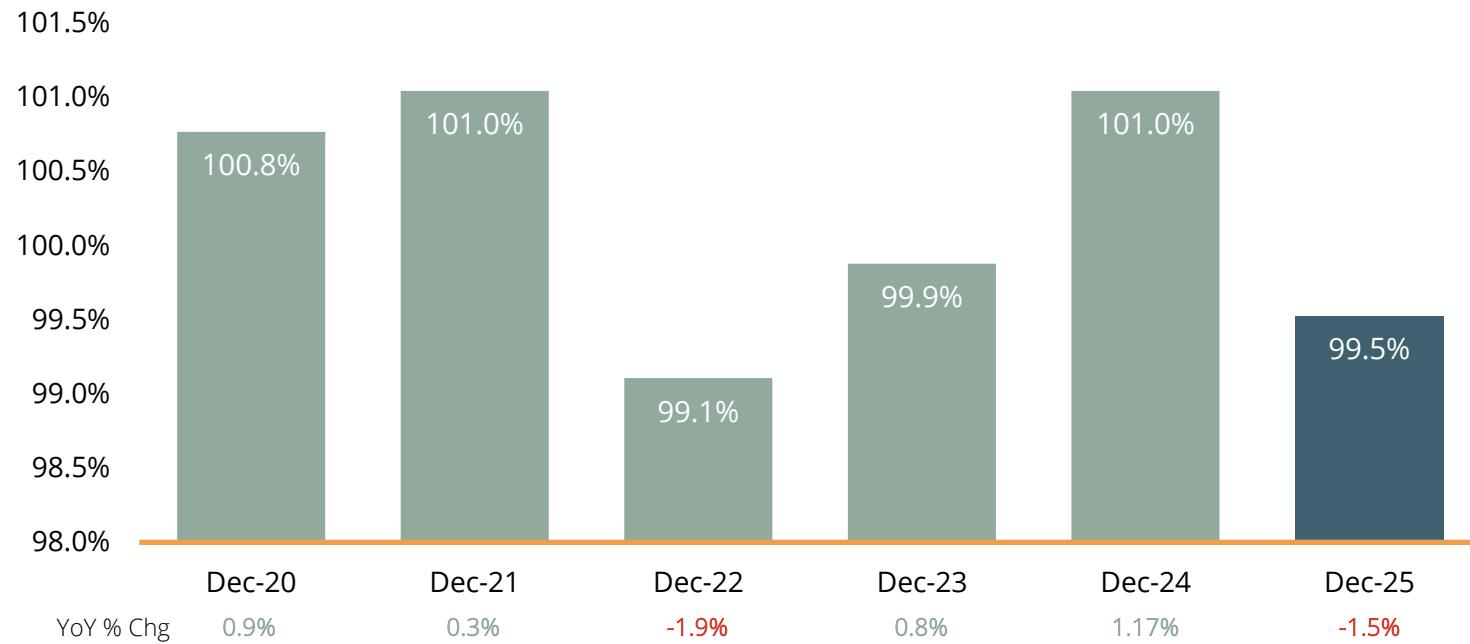
## Zip Code



# Average Sold to Ask Price Ratio



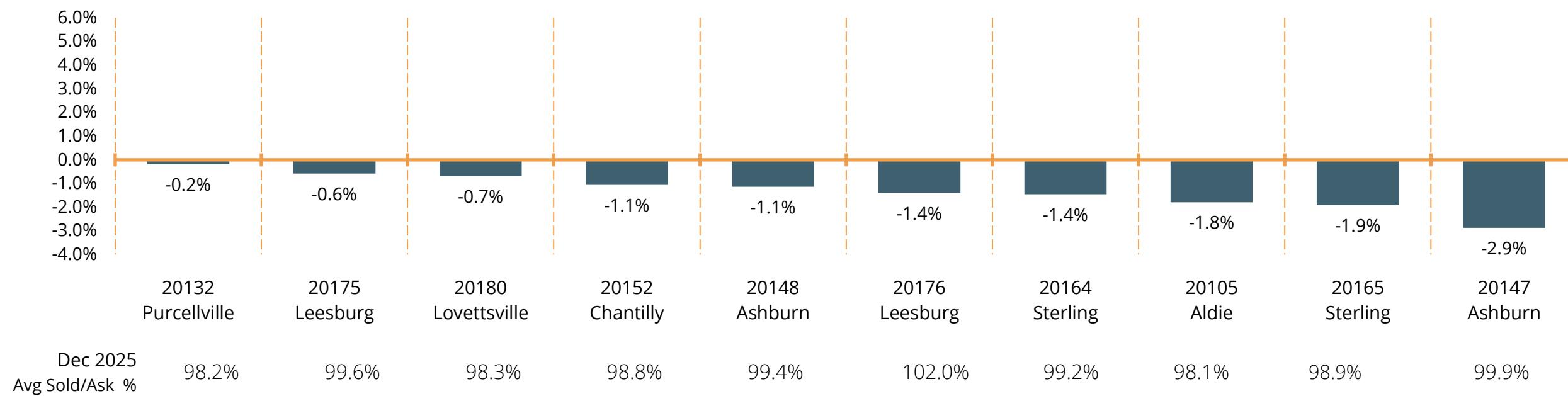
## Loudoun County



Month	Single-Family Detached	YoY Chg	Townhome & Condo	YoY Chg
Jan-25	<b>101.3%</b>	-2.8%	<b>99.9%</b>	-0.2%
Feb-25	<b>102.1%</b>	0.6%	<b>100.7%</b>	-0.4%
Mar-25	<b>102.0%</b>	-0.1%	<b>101.0%</b>	0.0%
Apr-25	<b>101.3%</b>	-0.5%	<b>101.0%</b>	-0.9%
May-25	<b>101.8%</b>	-1.5%	<b>100.4%</b>	-1.1%
Jun-25	<b>100.1%</b>	-1.8%	<b>100.4%</b>	-0.4%
Jul-25	<b>101.1%</b>	-0.9%	<b>99.6%</b>	-1.1%
Aug-25	<b>99.7%</b>	-1.1%	<b>99.6%</b>	-0.5%
Sep-25	<b>99.2%</b>	-2.9%	<b>99.5%</b>	-0.6%
Oct-25	<b>99.7%</b>	-0.6%	<b>99.3%</b>	-0.9%
Nov-25	<b>99.6%</b>	-1.6%	<b>99.3%</b>	-1.1%
Dec-25	<b>99.2%</b>	-2.0%	<b>99.7%</b>	-1.1%
12-month Avg	100.6%	-1.3%	100.0%	-0.7%

## Zip Code

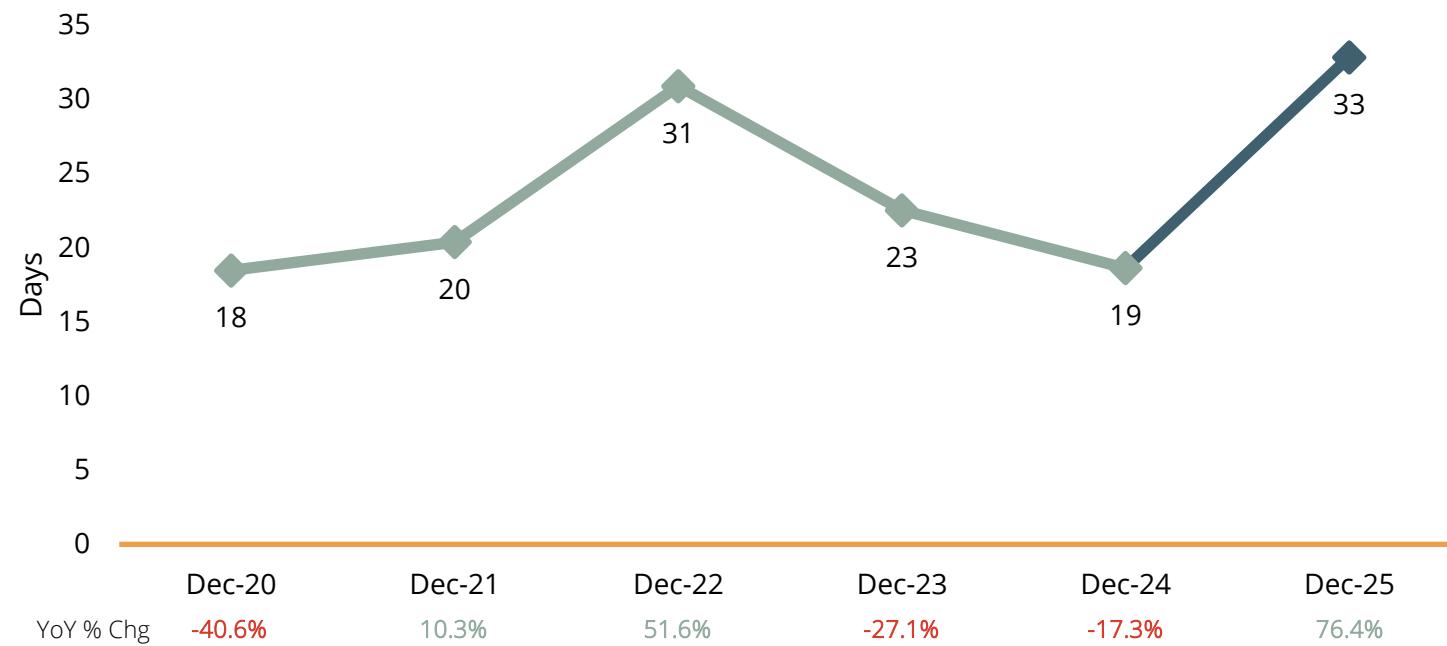
% Change in Average Sold to Ask Price Ratio  
Dec-24 to Dec-25



# Average Days on Market



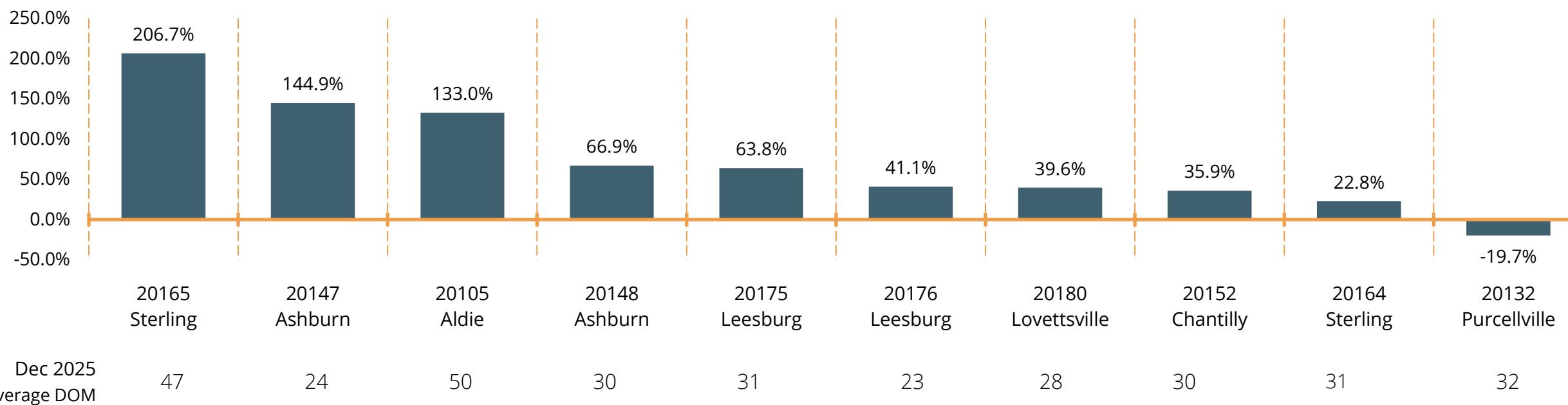
## Loudoun County



Month	Single-Family Detached	YoY Chg	Townhome & Condo	YoY Chg
Jan-25	30	-10.0%	26	5.6%
Feb-25	22	7.2%	18	2.9%
Mar-25	18	36.7%	19	-3.7%
Apr-25	18	30.8%	15	-16.1%
May-25	13	32.1%	17	36.3%
Jun-25	19	84.6%	16	-6.6%
Jul-25	19	21.1%	22	43.8%
Aug-25	24	59.8%	24	43.0%
Sep-25	31	54.8%	29	18.7%
Oct-25	32	-5.0%	27	33.6%
Nov-25	34	54.4%	24	29.9%
Dec-25	37	107.8%	30	54.1%
12-month Avg	25	31.9%	22	19.1%

## Zip Code

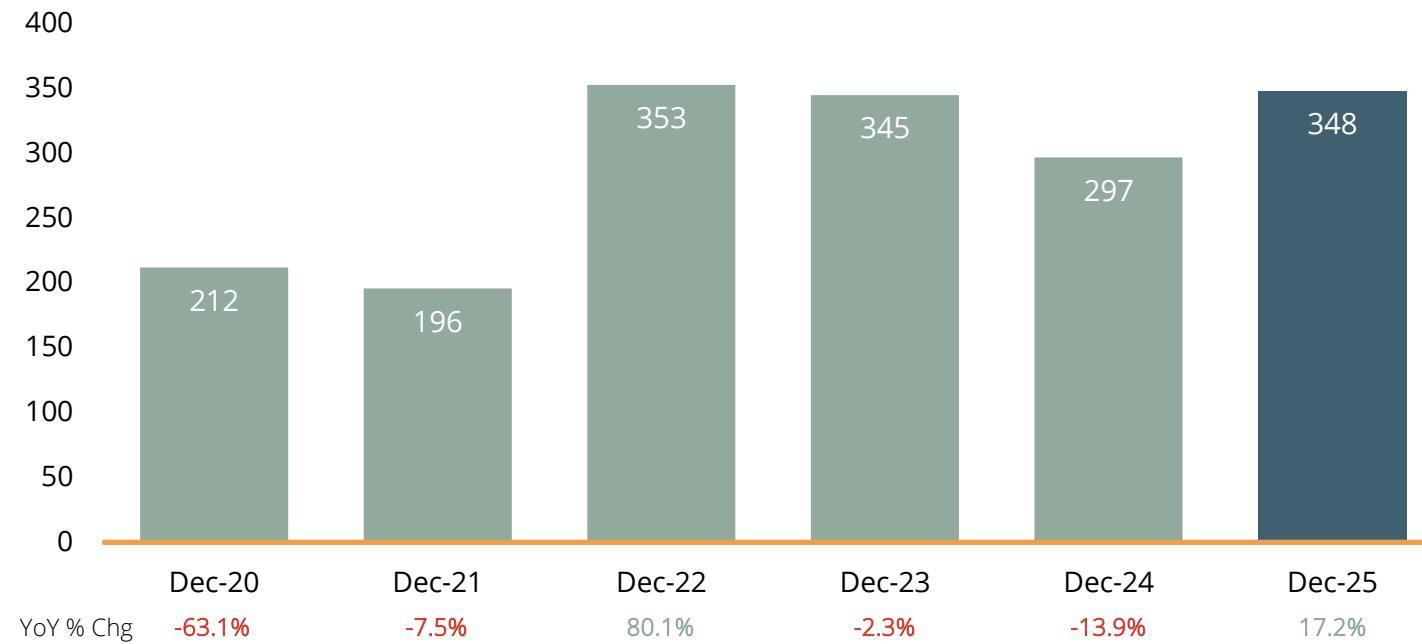
% Change in Average Days on Market  
Dec-24 to Dec-25



# Active Listings

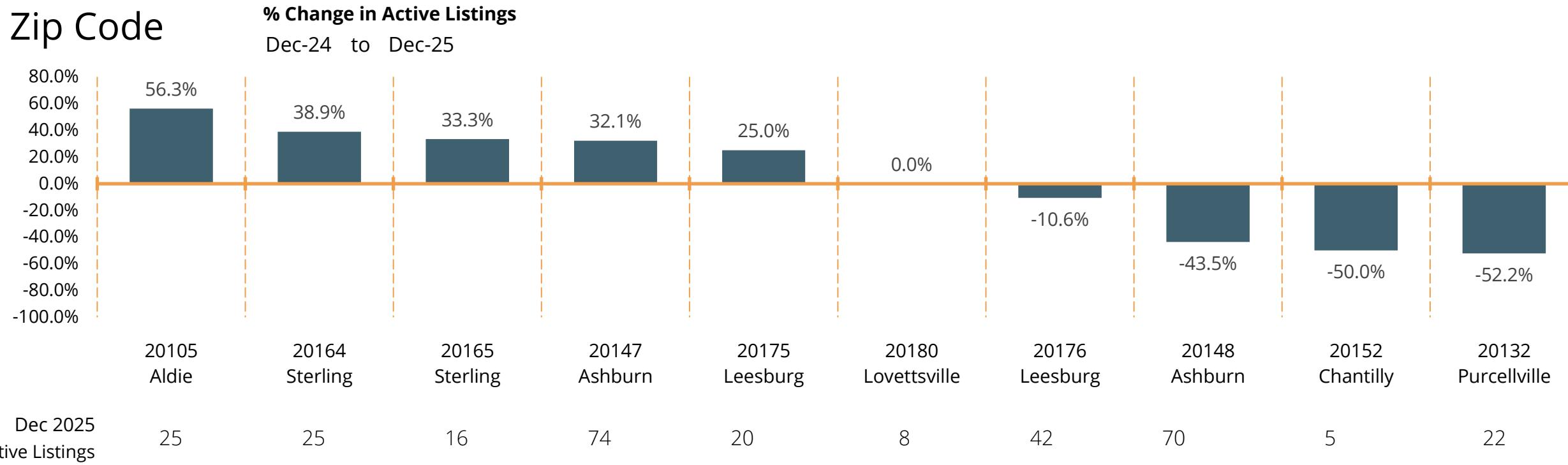


## Loudoun County



Month	Single-Family Detached	YoY Chg	Townhome & Condo	YoY Chg
Jan-25	172	-0.6%	199	23.6%
Feb-25	200	9.9%	226	29.9%
Mar-25	259	43.9%	238	33.0%
Apr-25	359	97.3%	285	46.9%
May-25	416	61.2%	392	75.0%
Jun-25	416	57.6%	369	62.6%
Jul-25	367	49.2%	365	60.1%
Aug-25	347	36.1%	340	37.7%
Sep-25	355	53.0%	338	20.3%
Oct-25	277	14.5%	352	42.5%
Nov-25	210	1.0%	299	45.1%
Dec-25	148	2.8%	200	30.7%
12-month Avg	294	37.4%	300	42.9%

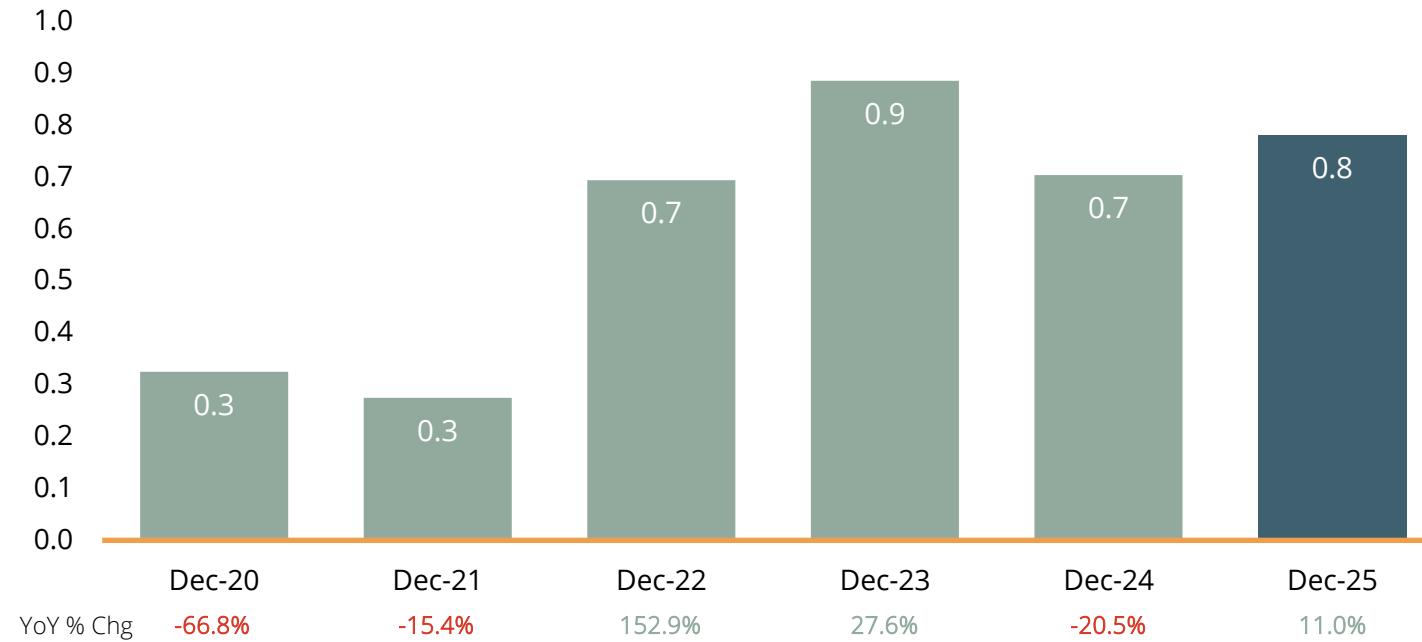
## Zip Code



# Months Supply



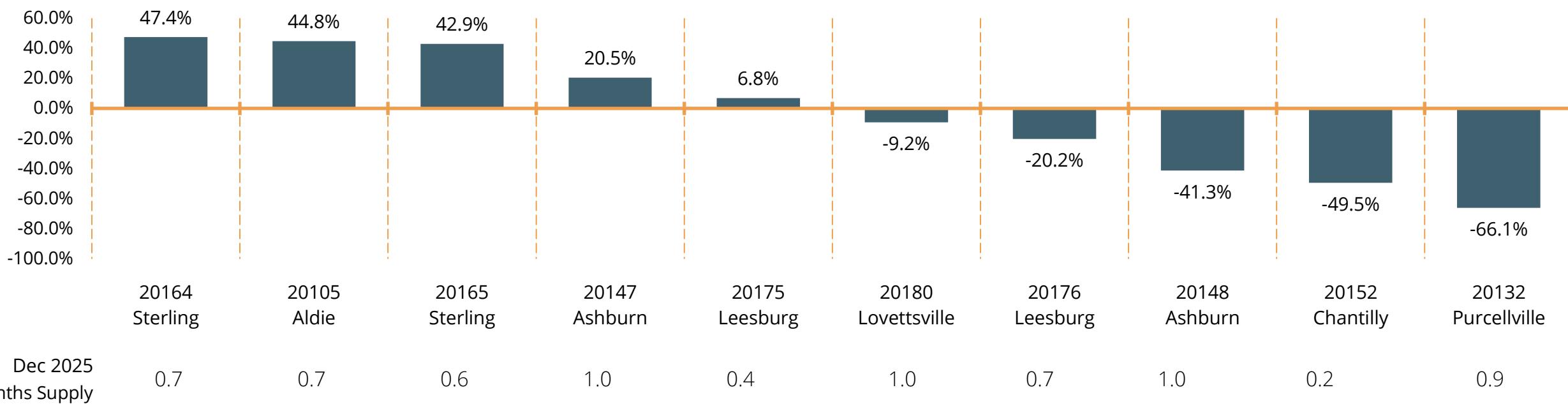
## Loudoun County



Month	Single-Family Detached	YoY Chg	Townhome & Condo	YoY Chg
Jan-25	<b>0.9</b>	-7.2%	<b>0.9</b>	13.0%
Feb-25	<b>1.0</b>	0.8%	<b>1.0</b>	19.3%
Mar-25	<b>1.3</b>	30.7%	<b>1.0</b>	21.3%
Apr-25	<b>1.8</b>	78.5%	<b>1.2</b>	33.4%
May-25	<b>2.1</b>	44.1%	<b>0.0</b>	-100.0%
Jun-25	<b>2.1</b>	39.4%	<b>1.6</b>	46.5%
Jul-25	<b>1.8</b>	31.1%	<b>1.6</b>	50.4%
Aug-25	<b>1.7</b>	20.6%	<b>1.4</b>	25.6%
Sep-25	<b>1.7</b>	34.2%	<b>1.4</b>	11.6%
Oct-25	<b>1.3</b>	1.8%	<b>1.5</b>	36.1%
Nov-25	<b>1.0</b>	-10.5%	<b>1.3</b>	40.8%
Dec-25	<b>3.7</b>	385.9%	<b>0.9</b>	29.1%
12-month Avg	1.7	44.0%	1.1	18.2%

## Zip Code

**% Change in Months of Supply**  
Dec-24 to Dec-25



# Area Overview



New Listings				Sales				Median Sales Price			Active Listings			Months Supply		
Geography	Dec-24	Dec-25	% chg	Dec-24	Dec-25	% chg	Dec-24	Dec-25	% chg	Dec-24	Dec-25	% chg	Dec-24	Dec-25	% chg	
Loudoun County	278	<b>263</b>	-5.4%	392	<b>404</b>	3.1%	\$736,267	<b>\$739,847</b>	0.5%	297	<b>348</b>	17.2%	0.7	<b>0.8</b>	11.0%	
20105	28	<b>20</b>	-28.6%	31	<b>35</b>	12.9%	\$950,000	<b>\$995,000</b>	4.7%	16	<b>25</b>	56.3%	0.5	<b>0.7</b>	44.8%	
20132	22	<b>14</b>	-36.4%	13	<b>19</b>	46.2%	\$930,000	<b>\$875,000</b>	-5.9%	46	<b>22</b>	-52.2%	2.8	<b>0.9</b>	-66.1%	
20147	43	<b>54</b>	25.6%	78	<b>77</b>	-1.3%	\$734,139	<b>\$699,450</b>	-4.7%	56	<b>74</b>	32.1%	0.8	<b>1.0</b>	20.5%	
20148	56	<b>49</b>	-12.5%	56	<b>55</b>	-1.8%	\$836,076	<b>\$846,990</b>	1.3%	124	<b>70</b>	-43.5%	1.8	<b>1.0</b>	-41.3%	
20152	14	<b>8</b>	-42.9%	26	<b>19</b>	-26.9%	\$676,450	<b>\$679,000</b>	0.4%	10	<b>5</b>	-50.0%	0.4	<b>0.2</b>	-49.5%	
20164	25	<b>15</b>	-40.0%	25	<b>33</b>	32.0%	\$565,000	<b>\$577,000</b>	2.1%	18	<b>25</b>	38.9%	0.5	<b>0.7</b>	47.4%	
20165	17	<b>17</b>	0.0%	28	<b>18</b>	-35.7%	\$647,000	<b>\$665,000</b>	2.8%	12	<b>16</b>	33.3%	0.4	<b>0.6</b>	42.9%	
20175	19	<b>26</b>	36.8%	36	<b>48</b>	33.3%	\$1,037,500	<b>\$797,000</b>	-23.2%	16	<b>20</b>	25.0%	0.4	<b>0.4</b>	6.8%	
20176	25	<b>32</b>	28.0%	49	<b>56</b>	14.3%	\$1,100,000	<b>\$965,000</b>	-12.3%	47	<b>42</b>	-10.6%	0.9	<b>0.7</b>	-20.2%	
20180	5	<b>4</b>	-20.0%	13	<b>4</b>	-69.2%	\$820,000	<b>\$797,000</b>	-2.8%	8	<b>8</b>	0.0%	1.1	<b>1.0</b>	-9.2%	



The Virginia REALTORS® association is the largest professional trade association in Virginia, representing 35,000 REALTORS® engaged in the residential and commercial real estate business. The Virginia REALTORS® association serves as the advocate for homeownership and private property rights and represents the interests of real estate professionals and property owners in the Commonwealth of Virginia.

NOTE: The term REALTOR® is a registered collective membership mark that identifies a real estate professional who is a member of the National Association of REALTORS® and subscribes to its strict code of ethics.

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Data and analysis provided by Virginia REALTORS® Research Team

The numbers reported here are preliminary and based on current entries into multiple listing services. Over time, data may be adjusted slightly to reflect increased reporting. Information is sourced from multiple listing services across Virginia and is deemed reliable, but not guaranteed.