

Elliman Report

Q2-2025 Orange County, CA Sales

Single Family & Condo Dashboard

YEAR-OVER-YEAR

+ 4.3%
Prices
Median Sales Price

+ 1.3 mos
Pace
Months of Supply

- 14.3%
Sales
Closed Sales

+ 57.6%
Inventory
Total Inventory

+ 7 days
Marketing Time
Days on Market

+ 2.4%
Negotiability
Listing Discount

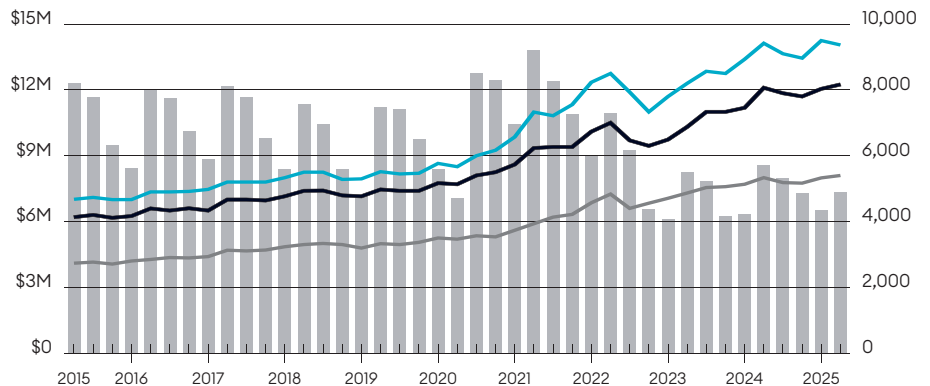
- Price trend indicators moved higher annually to new records
- Sales declined year over year for the first time in six quarters
- Approximately seven out of ten sales had a days on market of less than thirty days

Finance (Sales Share)	Current Quarter	Prior Year Quarter
Single Family Cash	48.4%	48.8%
Single Family Mortgage	51.6%	51.2%
Condo Cash	42.8%	47.3%
Condo Mortgage	57.2%	52.7%

Median Sales Price
■ Condos ■ Single Family ■ All

Orange County

Number of Sales



Orange County Matrix	Q2-2025	%Δ (QTR)	Q1-2025	%Δ (YR)	Q2-2024
Average Sales Price	\$1,615,911	1.4%	\$1,593,326	4.3%	\$1,549,662
Average Price Per Sq Ft	\$824	1.6%	\$811	5.8%	\$779
Median Sales Price	\$1,225,000	1.7%	\$1,205,000	1.2%	\$1,210,000
Number of Sales (Closed)	4,880	12.2%	4,349	-14.3%	5,697
Days on Market (From Last List Date)	28	-20.0%	35	33.3%	21
Listing Discount (From Last List Price)	2.9%		2.6%		0.5%
Listing Inventory	4,518	20.4%	3,752	57.6%	2,867
Months of Supply	2.8	7.7%	2.6	86.7%	1.5
Average Square Feet	1,961	-0.2%	1,965	-1.4%	1,989
Year-to-Date	Q2-2025	%Δ (QTR)	Q1-2025	%Δ (YR)	Q2-2024
Average Sales Price (YTD)	\$1,605,268	N/A	N/A	5.6%	\$1,520,544
Average Price per Sq Ft (YTD)	\$818	N/A	N/A	6.0%	\$772
Median Sales Price (YTD)	\$1,220,000	N/A	N/A	3.6%	\$1,178,000
Number of Sales (YTD)	9,229	N/A	N/A	-6.8%	9,907

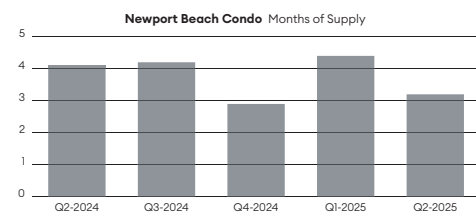
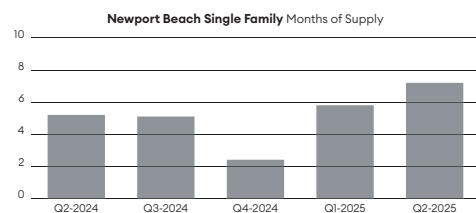
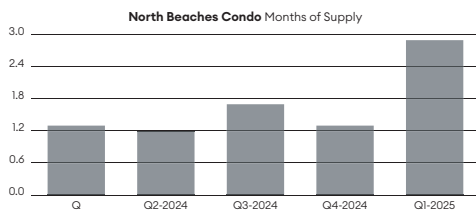
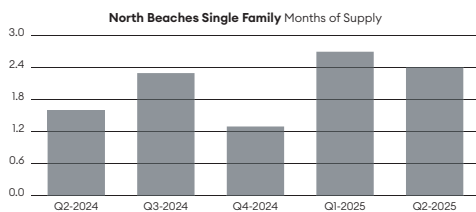
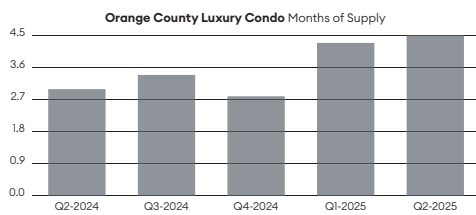
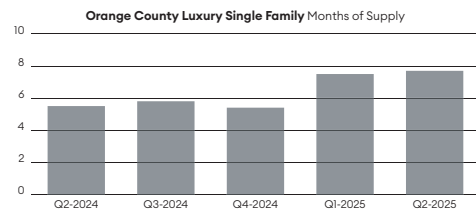
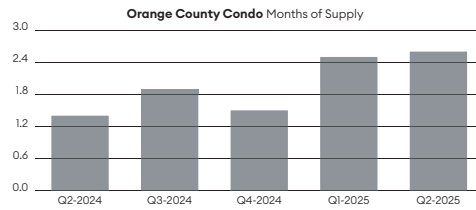
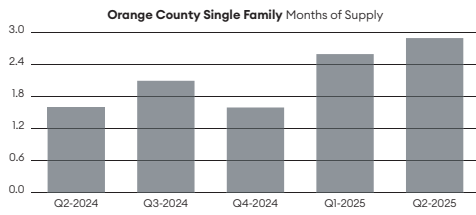
Days on Market (Sales Share)	Current Quarter	Prior Year Quarter
Single Family ≤ 30 Days	74.3%	82.6%
Single Family 31-60 Days	15.1%	10.4%
Single Family > 60 Days	10.6%	7.0%
Condo ≤ 30 Days	68.1%	79.1%
Condo 31-60 Days	16.4%	13.3%
Condo > 60 Days	15.4%	7.7%

Over/Under Last List (Sales Share)	Current Quarter	Prior Year Quarter
Single Family Over	37.9%	51.8%
Single Family At	11.4%	11.4%
Single Family Under	50.7%	36.8%
Condo Over	28.8%	49.4%
Condo At	12.7%	13.5%
Condo Under	58.6%	37.0%

The median sales price rose by 1.2% year over year to \$1,225,000, marking the fifth record set in the past eight quarters. The average sales price and average price per square foot also reached new highs during the same period. The number of sales dropped by 14.3% annually to 4,880, marking the first decline in six quarters, as listing inventory expanded by 57.6% to 4,518. With the slower market pace, the share of bidding wars, which indicates sales that closed above the last asking price, was 34.8%, down from 51% in the same period last year.



Prepared by Miller Samuel Real Estate Appraisers & Consultants



Single Family Matrix	Q2-2025	%Δ (QTR)	Q1-2025	%Δ (YR)	Q2-2024
Average Sales Price	\$1,950,782	0.5%	\$1,941,462	4.7%	\$1,862,730
Average Price Per Sq Ft	\$863	1.9%	\$847	6.8%	\$808
Median Sales Price	\$1,405,000	-1.4%	\$1,425,000	-0.6%	\$1,412,800
Number of Sales (Closed)	3,222	14.9%	2,803	-14.1%	3,753
Days on Market (From Last List Date)	26	-25.7%	35	30.0%	20
Listing Discount (From Last List Price)	3.2%		2.8%		0.9%

Condo Matrix	Q2-2025	%Δ (QTR)	Q1-2025	%Δ (YR)	Q2-2024
Average Sales Price	\$965,154	0.3%	\$962,132	2.1%	\$945,266
Average Price Per Sq Ft	\$700	-0.3%	\$702	2.2%	\$685
Median Sales Price	\$810,000	1.4%	\$799,000	1.3%	\$800,000
Number of Sales (Closed)	1,658	7.2%	1,546	-14.7%	1,944
Days on Market (From Last List Date)	32	-8.6%	35	52.4%	21
Listing Discount (From Last List Price)	2.0%		1.7%		-0.7%

Luxury Single Family Matrix (Top 10% of Sales)	Q2-2025	%Δ (QTR)	Q1-2025	%Δ (YR)	Q2-2024
Average Sales Price	\$6,193,043	3.2%	\$5,999,875	16.4%	\$5,320,424
Average Price Per Sq Ft	\$1,542	7.2%	\$1,439	17.8%	\$1,309
Median Sales Price	\$4,850,000	-3.0%	\$5,000,000	15.0%	\$4,217,500
Number of Sales (Closed)	323	14.9%	281	-14.1%	376
Days on Market (From Last List Date)	51	-23.9%	67	18.6%	43
Listing Discount (From Last List Price)	6.4%		5.9%		5.1%

Luxury Condo Matrix (Top 10% of Sales)	Q2-2025	%Δ (QTR)	Q1-2025	%Δ (YR)	Q2-2024
Average Sales Price	\$2,288,464	-4.1%	\$2,385,871	2.5%	\$2,233,373
Average Price Per Sq Ft	\$1,087	-1.3%	\$1,101	6.6%	\$1,020
Median Sales Price	\$1,975,000	-7.1%	\$2,125,000	3.9%	\$1,900,000
Number of Sales (Closed)	166	5.1%	158	-14.9%	195
Days on Market (From Last List Date)	42	10.5%	38	61.5%	26
Listing Discount (From Last List Price)	3.3%		2.8%		0.4%
Entry Price Threshold	\$1,598,800	-3.1%	\$1,650,000	4.8%	\$1,525,000

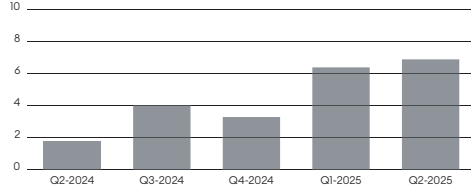
North Beaches SF Matrix	Q2-2025	%Δ (QTR)	Q1-2025	%Δ (YR)	Q2-2024
Average Sales Price	\$1,739,538	-7.6%	\$1,883,500	1.4%	\$1,715,096
Average Price Per Sq Ft	\$832	-4.0%	\$867	3.2%	\$806
Median Sales Price	\$1,505,000	-2.5%	\$1,543,000	1.3%	\$1,485,000
Number of Sales (Closed)	265	19.9%	221	-10.2%	295
Days on Market (From Last List Date)	27	-22.9%	35	28.6%	21
Listing Discount (From Last List Price)	1.9%		3.2%		2.0%

North Beaches Condo Matrix	Q2-2025	%Δ (QTR)	Q1-2025	%Δ (YR)	Q2-2024
Average Sales Price	\$856,026	1.0%	\$847,646	-4.3%	\$894,200
Average Price Per Sq Ft	\$671	-0.4%	\$674	-2.6%	\$689
Median Sales Price	\$737,500	3.1%	\$715,000	-3.3%	\$762,500
Number of Sales (Closed)	120	20.0%	100	-18.9%	148
Days on Market (From Last List Date)	36	-5.3%	38	28.6%	28
Listing Discount (From Last List Price)	2.9%		1.4%		0.9%

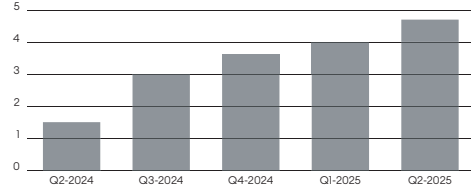
Newport Beach SF Matrix	Q2-2025	%Δ (QTR)	Q1-2025	%Δ (YR)	Q2-2024
Average Sales Price	\$6,596,195	11.8%	\$5,900,556	24.1%	\$5,314,671
Average Price Per Sq Ft	\$2,049	19.8%	\$1,710	21.2%	\$1,690
Median Sales Price	\$5,062,500	1.3%	\$5,000,000	18.8%	\$4,262,500
Number of Sales (Closed)	128	4.1%	123	-11.1%	144
Days on Market (From Last List Date)	41	-16.3%	49	10.8%	37
Listing Discount (From Last List Price)	6.1%		5.5%		5.9%

Newport Beach Condo Matrix	Q2-2025	%Δ (QTR)	Q1-2025	%Δ (YR)	Q2-2024
Average Sales Price	\$2,070,690	6.2%	\$1,950,253	-2.9%	\$2,131,863
Average Price Per Sq Ft	\$1,162	7.9%	\$1,077	2.6%	\$1,133
Median Sales Price	\$1,600,000	-15.2%	\$1,887,500	-0.5%	\$1,607,500
Number of Sales (Closed)	63	16.7%	54	8.6%	58
Days on Market (From Last List Date)	44	41.9%	31	76.0%	25
Listing Discount (From Last List Price)	3.7%		2.6%		-0.1%

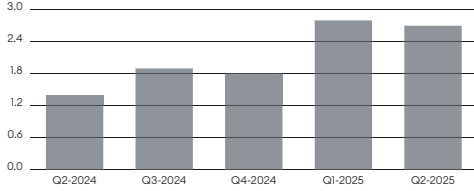
City of Irvine Single Family Months of Supply



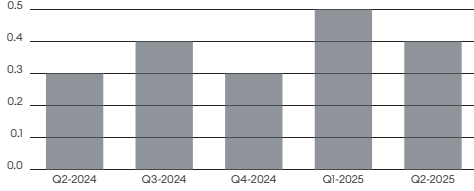
City of Irvine Condo Months of Supply



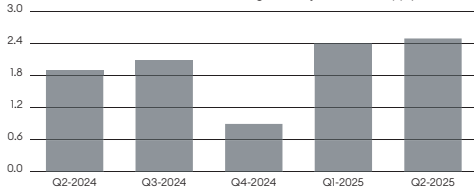
City of Laguna Beach Single Family Months of Supply



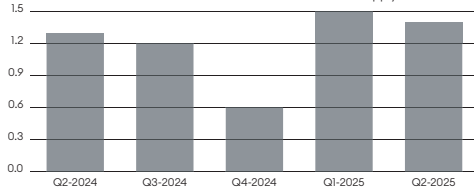
City of Laguna Beach Condo Months of Supply



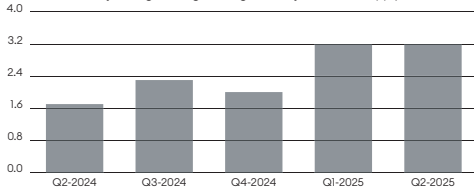
Dana Point + San Clemente Single Family Months of Supply



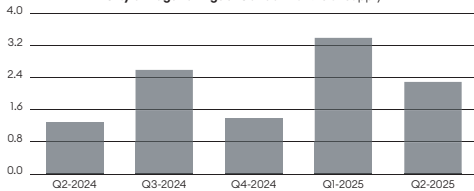
Dana Point + San Clemente Condo Months of Supply



City of Laguna Niguel Single Family Months of Supply



City of Laguna Niguel Condo Months of Supply



City of Irvine SF Matrix	Q2-2025	%Δ (QTR)	Q1-2025	%Δ (YR)	Q2-2024
Average Sales Price	\$2,848,854	-4.0%	\$2,966,177	-0.2%	\$2,854,716
Average Price Per Sq Ft	\$1,010	-3.9%	\$1,051	0.5%	\$1,005
Median Sales Price	\$2,475,000	4.0%	\$2,380,000	4.0%	\$2,380,000
Number of Sales (Closed)	151	20.8%	125	-31.4%	220
Days on Market (From Last List Date)	28	-33.3%	42	47.4%	19
Listing Discount (From Last List Price)	3.9%		2.7%		-0.3%

City of Irvine Condo Matrix	Q2-2025	%Δ (QTR)	Q1-2025	%Δ (YR)	Q2-2024
Average Sales Price	\$1,334,127	-0.7%	\$1,344,111	0.3%	\$1,330,299
Average Price Per Sq Ft	\$776	0.3%	\$774	-3.4%	\$803
Median Sales Price	\$1,300,000	1.8%	\$1,276,500	0.0%	\$1,300,000
Number of Sales (Closed)	233	0.4%	232	-18.0%	284
Days on Market (From Last List Date)	31	-16.2%	37	93.8%	16
Listing Discount (From Last List Price)	2.2%		2.2%		-2.1%

City of Laguna Beach SF Matrix	Q2-2025	%Δ (QTR)	Q1-2025	%Δ (YR)	Q2-2024
Average Sales Price	\$2,414,036	-1.9%	\$2,461,092	-10.0%	\$2,681,017
Average Price Per Sq Ft	\$1,020	4.8%	\$973	-3.9%	\$1,061
Median Sales Price	\$1,792,000	-6.9%	\$1,925,000	-3.1%	\$1,850,000
Number of Sales (Closed)	210	5.5%	199	-24.2%	277
Days on Market (From Last List Date)	30	-31.8%	44	3.4%	29
Listing Discount (From Last List Price)	4.5%		3.9%		3.6%

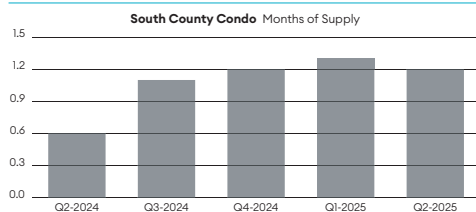
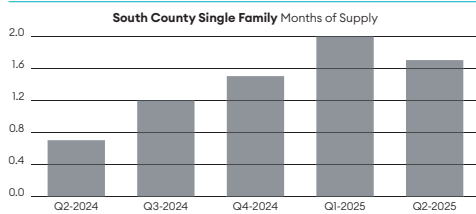
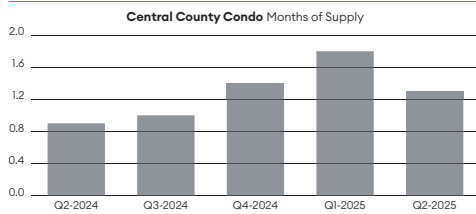
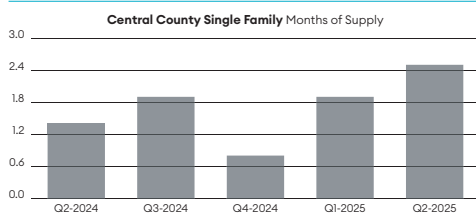
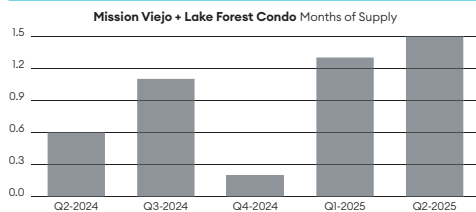
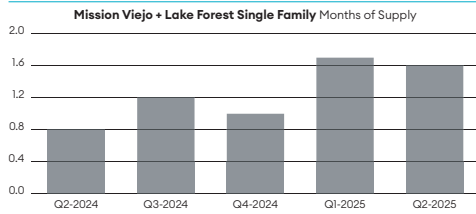
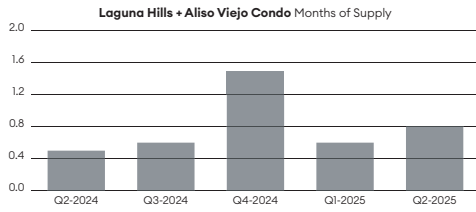
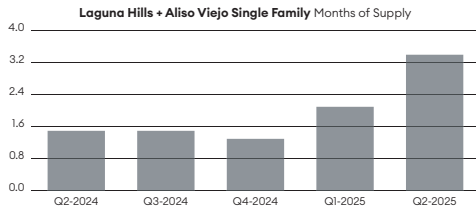
City of Laguna Beach Condo Matrix	Q2-2025	%Δ (QTR)	Q1-2025	%Δ (YR)	Q2-2024
Average Sales Price	\$959,258	3.2%	\$929,236	1.5%	\$945,321
Average Price Per Sq Ft	\$723	-2.3%	\$740	0.8%	\$717
Median Sales Price	\$848,500	6.2%	\$799,000	2.8%	\$825,000
Number of Sales (Closed)	176	40.8%	125	-1.7%	179
Days on Market (From Last List Date)	31	-3.1%	32	55.0%	20
Listing Discount (From Last List Price)	3.0%		1.4%		-0.1%

Dana Point+San Clemente SF Matrix	Q2-2025	%Δ (QTR)	Q1-2025	%Δ (YR)	Q2-2024
Average Sales Price	\$2,631,824	13.7%	\$2,314,900	22.8%	\$2,142,684
Average Price Per Sq Ft	\$977	6.8%	\$915	19.0%	\$821
Median Sales Price	\$1,948,000	8.2%	\$1,800,000	4.2%	\$1,870,000
Number of Sales (Closed)	244	9.9%	222	-18.7%	300
Days on Market (From Last List Date)	34	-24.4%	45	54.5%	22
Listing Discount (From Last List Price)	6.2%		5.0%		1.1%

Dana Point+San Clemente Condo Matrix	Q2-2025	%Δ (QTR)	Q1-2025	%Δ (YR)	Q2-2024
Average Sales Price	\$1,087,155	-6.7%	\$1,165,340	8.4%	\$1,002,531
Average Price Per Sq Ft	\$722	-5.2%	\$762	4.2%	\$693
Median Sales Price	\$995,000	7.6%	\$925,000	10.4%	\$900,997
Number of Sales (Closed)	121	2.5%	118	-15.4%	143
Days on Market (From Last List Date)	31	-26.2%	42	14.8%	27
Listing Discount (From Last List Price)	2.4%		3.1%		1.0%

City of Laguna Niguel SF Matrix	Q2-2025	%Δ (QTR)	Q1-2025	%Δ (YR)	Q2-2024
Average Sales Price	\$1,963,665	-17.0%	\$2,365,880	-2.2%	\$2,007,191
Average Price Per Sq Ft	\$837	-3.2%	\$865	2.2%	\$819
Median Sales Price	\$1,720,000	-8.3%	\$1,875,000	-0.4%	\$1,726,500
Number of Sales (Closed)	89	8.5%	82	-27.0%	122
Days on Market (From Last List Date)	23	-41.0%	39	9.5%	21
Listing Discount (From Last List Price)	2.1%		2.3%		0.8%

City of Laguna Niguel Condo Matrix	Q2-2025	%Δ (QTR)	Q1-2025	%Δ (YR)	Q2-2024
Average Sales Price	\$935,724	19.0%	\$786,344	5.5%	\$886,627
Average Price Per Sq Ft	\$678	2.0%	\$665	-2.3%	\$694
Median Sales Price	\$847,000	18.5%	\$715,000	8.6%	\$780,000
Number of Sales (Closed)	75	66.7%	45	11.9%	67
Days on Market (From Last List Date)	39	2.6%	38	95.0%	20
Listing Discount (From Last List Price)	4.3%		1.1%		0.2%



Laguna Hills+Aliso Viejo SF Matrix	Q2-2025	%Δ (QTR)	Q1-2025	%Δ (YR)	Q2-2024
Average Sales Price	\$1,768,661	-4.9%	\$1,859,050	-0.8%	\$1,782,180
Average Price Per Sq Ft	\$705	0.6%	\$701	1.6%	\$694
Median Sales Price	\$1,562,500	4.3%	\$1,497,500	2.5%	\$1,525,000
Number of Sales (Closed)	63	5.0%	60	-20.3%	79
Days on Market (From Last List Date)	23	-4.2%	24	76.9%	13
Listing Discount (From Last List Price)	1.1%		1.2%		-0.5%

Laguna Hills+Aliso Viejo Condo Matrix	Q2-2025	%Δ (QTR)	Q1-2025	%Δ (YR)	Q2-2024
Average Sales Price	\$681,217	1.4%	\$671,500	-5.4%	\$720,260
Average Price Per Sq Ft	\$563	3.3%	\$545	-0.5%	\$566
Median Sales Price	\$675,000	3.1%	\$655,000	-2.9%	\$695,000
Number of Sales (Closed)	192	20.8%	159	-9.0%	211
Days on Market (From Last List Date)	27	-20.6%	34	17.4%	23
Listing Discount (From Last List Price)	1.6%		1.7%		-1.3%

Mission Viejo+Lake Forest SF Matrix	Q2-2025	%Δ (QTR)	Q1-2025	%Δ (YR)	Q2-2024
Average Sales Price	\$1,599,452	3.8%	\$1,540,409	-2.3%	\$1,636,516
Average Price Per Sq Ft	\$692	1.2%	\$684	-0.7%	\$697
Median Sales Price	\$1,398,000	5.0%	\$1,332,000	-1.9%	\$1,425,000
Number of Sales (Closed)	447	36.7%	327	-10.2%	498
Days on Market (From Last List Date)	25	-24.2%	33	31.6%	19
Listing Discount (From Last List Price)	1.9%		1.6%		-0.6%

Mission Viejo+Lake Forest Condo Matrix	Q2-2025	%Δ (QTR)	Q1-2025	%Δ (YR)	Q2-2024
Average Sales Price	\$844,218	4.2%	\$810,495	1.5%	\$831,749
Average Price Per Sq Ft	\$615	1.3%	\$607	1.0%	\$609
Median Sales Price	\$820,000	3.5%	\$791,990	2.5%	\$799,900
Number of Sales (Closed)	177	-12.8%	203	-29.5%	251
Days on Market (From Last List Date)	29	-14.7%	34	52.6%	19
Listing Discount (From Last List Price)	1.2%		1.0%		-1.0%

Central County SF Matrix	Q2-2025	%Δ (QTR)	Q1-2025	%Δ (YR)	Q2-2024
Average Sales Price	\$1,614,485	-3.0%	\$1,664,354	-3.2%	\$1,667,911
Average Price Per Sq Ft	\$706	6.6%	\$662	5.1%	\$672
Median Sales Price	\$1,455,000	3.9%	\$1,400,000	0.0%	\$1,455,000
Number of Sales (Closed)	114	1.8%	112	-14.3%	133
Days on Market (From Last List Date)	27	-30.8%	39	42.1%	19
Listing Discount (From Last List Price)	2.7%		2.4%		-1.5%

Central County Condo Matrix	Q2-2025	%Δ (QTR)	Q1-2025	%Δ (YR)	Q2-2024
Average Sales Price	\$941,148	16.3%	\$809,140	7.6%	\$874,898
Average Price Per Sq Ft	\$659	2.2%	\$645	3.8%	\$635
Median Sales Price	\$895,000	21.8%	\$735,000	8.5%	\$825,000
Number of Sales (Closed)	67	36.7%	49	0.0%	67
Days on Market (From Last List Date)	21	-25.0%	28	40.0%	15
Listing Discount (From Last List Price)	0.0%		0.5%		-2.0%

South County SF Matrix	Q2-2025	%Δ (QTR)	Q1-2025	%Δ (YR)	Q2-2024
Average Sales Price	\$1,718,747	6.0%	\$1,621,474	0.8%	\$1,705,297
Average Price Per Sq Ft	\$682	1.8%	\$670	0.3%	\$680
Median Sales Price	\$1,450,000	3.6%	\$1,400,000	-2.3%	\$1,483,500
Number of Sales (Closed)	467	35.4%	345	-11.6%	528
Days on Market (From Last List Date)	29	-14.7%	34	81.3%	16
Listing Discount (From Last List Price)	3.1%		1.9%		-0.5%

South County Condo Matrix	Q2-2025	%Δ (QTR)	Q1-2025	%Δ (YR)	Q2-2024
Average Sales Price	\$852,980	4.8%	\$813,905	4.8%	\$814,137
Average Price Per Sq Ft	\$623	2.5%	\$608	1.8%	\$612
Median Sales Price	\$835,000	5.6%	\$790,500	4.4%	\$800,000
Number of Sales (Closed)	213	1.4%	210	-23.4%	278
Days on Market (From Last List Date)	28	-12.5%	32	55.6%	18
Listing Discount (From Last List Price)	1.3%		1.0%		-1.0%

Questions or comments? Email report author
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Methodology: [millersamuel.com/research-reports/methodology](https://www.millersamuel.com/research-reports/methodology)

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