

Elliman Report

Q3-2025 Orange County, CA Sales

Single Family & Condo Dashboard

YEAR-OVER-YEAR

+ 0.7%
Prices
Median Sales Price

+ 0.1 mos
Pace
Months of Supply

+ 2.0%
Sales
Closed Sales

+ 7.5%
Inventory
Total Inventory

+ 11 days
Marketing Time
Days on Market

+ 1.9%
Negotiability
Listing Discount

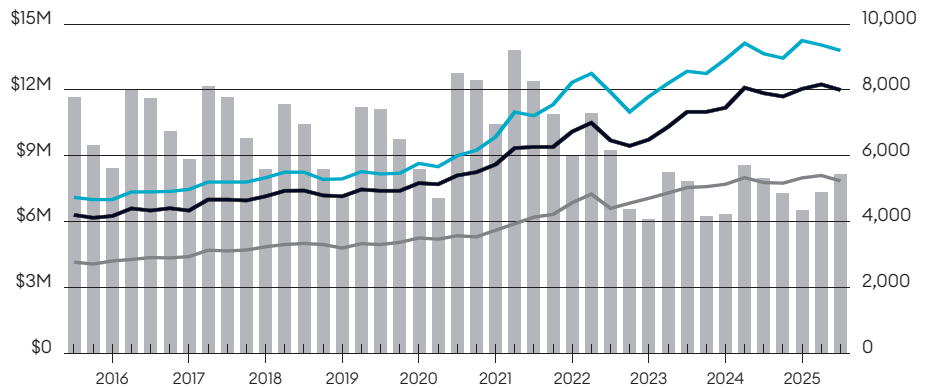
- Price trend indicators continued to increase year over year
- Sales rose year over year for the sixth time in seven quarters
- Sales above the \$1 million threshold rose annually while sales below the threshold declined

Finance (Sales Share)	Current Quarter	Prior Year Quarter
Single Family Cash	46.6%	49.0%
Single Family Mortgage	53.4%	50.9%
Condo Cash	45.0%	46.7%
Condo Mortgage	55.0%	53.3%

Median Sales Price
■ Condos ■ Single Family ■ All

Orange County

Number of Sales



Orange County Matrix	Q3-2025	%Δ (QTR)	Q2-2025	%Δ (YR)	Q3-2024
Average Sales Price	\$1,529,398	-5.4%	\$1,615,911	0.7%	\$1,518,105
Average Price Per Sq Ft	\$793	-3.8%	\$824	1.5%	\$781
Median Sales Price	\$1,200,000	-2.0%	\$1,225,000	1.3%	\$1,185,000
Number of Sales (Closed)	5,415	11.0%	4,880	2.0%	5,308
Days on Market (From Last List Date)	36	28.6%	28	44.0%	25
Listing Discount (From Last List Price)	4.5%		2.9%		2.6%
Listing Inventory	3,865	-14.5%	4,518	7.5%	3,595
Months of Supply	2.1	-25.0%	2.8	5.0%	2.0
Average Square Feet	1,929	-1.6%	1,961	-0.8%	1,945
Year-to-Date	Q3-2025	%Δ (QTR)	Q2-2025	%Δ (YR)	Q3-2024
Average Sales Price (YTD)	\$1,577,213	N/A	N/A	3.8%	\$1,519,693
Average Price per Sq Ft (YTD)	\$809	N/A	N/A	4.4%	\$775
Median Sales Price (YTD)	\$1,205,000	N/A	N/A	2.1%	\$1,180,000
Number of Sales (YTD)	14,644	N/A	N/A	-3.8%	15,215

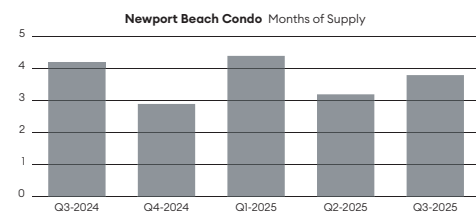
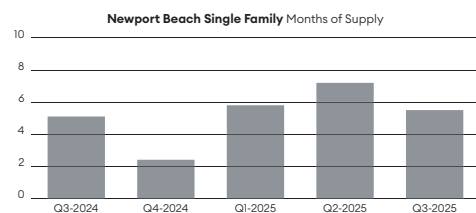
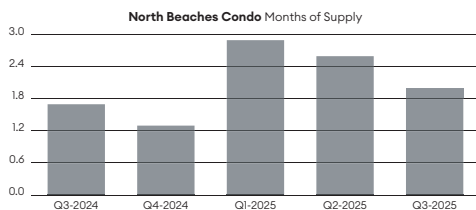
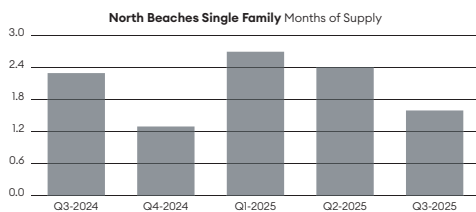
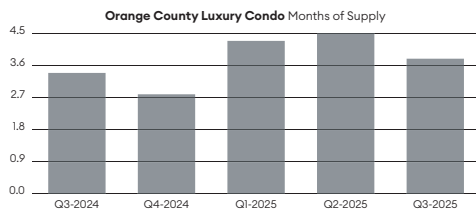
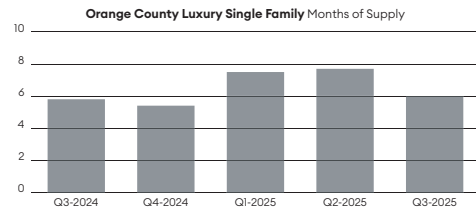
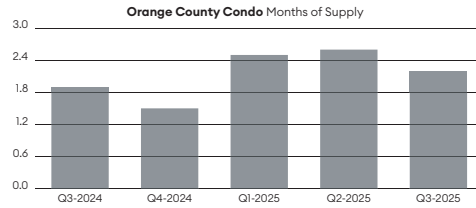
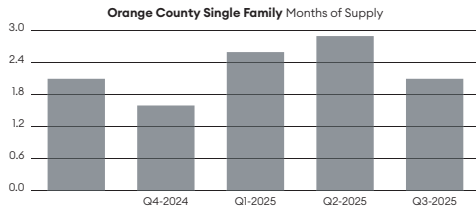
Days on Market (Sales Share)	Current Quarter	Prior Year Quarter
Single Family ≤ 30 Days	61.9%	75.1%
Single Family 31-60 Days	19.6%	15.2%
Single Family > 60 Days	18.5%	9.7%
Condo ≤ 30 Days	53.4%	73.6%
Condo 31-60 Days	24.6%	15.7%
Condo > 60 Days	22.0%	10.7%

Over/Under Last List (Sales Share)	Current Quarter	Prior Year Quarter
Single Family Over	28.7%	42.8%
Single Family At	9.6%	10.7%
Single Family Under	61.6%	46.5%
Condo Over	18.4%	38.7%
Condo At	12.4%	13.6%
Condo Under	69.1%	47.8%

Median sales price, average price per square foot, and average sales prices rose collectively year over year for the ninth time. Median sales price increased by 1.3% to \$1,200,000 as the other two overall price trend indicators followed the same pattern. Sales increased by 2% to 5,415 for the sixth annual increase over the past seven quarters. Listing inventory continued to rise, up by 7.5% to 3,865 from the same period last year for the sixth straight quarter, enabling sales to continue to rise.



Prepared by Miller Samuel Real Estate Appraisers & Consultants



Single Family Matrix	Q3-2025	%Δ (QTR)	Q2-2025	%Δ (YR)	Q3-2024
Average Sales Price	\$1,834,037	-6.0%	\$1,950,782	-0.2%	\$1,837,092
Average Price Per Sq Ft	\$828	-4.1%	\$863	1.8%	\$813
Median Sales Price	\$1,380,000	-1.8%	\$1,405,000	1.1%	\$1,365,000
Number of Sales (Closed)	3,587	11.3%	3,222	3.9%	3,453
Days on Market (From Last List Date)	34	30.8%	26	36.0%	25
Listing Discount (From Last List Price)	4.6%		3.2%		3.0%

Condo Matrix	Q3-2025	%Δ (QTR)	Q2-2025	%Δ (YR)	Q3-2024
Average Sales Price	\$931,620	-3.5%	\$965,154	0.8%	\$924,324
Average Price Per Sq Ft	\$681	-2.7%	\$700	0.1%	\$680
Median Sales Price	\$785,000	-3.1%	\$810,000	1.0%	\$777,500
Number of Sales (Closed)	1,828	10.3%	1,658	-1.5%	1,855
Days on Market (From Last List Date)	40	25.0%	32	60.0%	25
Listing Discount (From Last List Price)	4.0%		2.0%		1.1%

Luxury Single Family Matrix (Top 10% of Sales)	Q3-2025	%Δ (QTR)	Q2-2025	%Δ (YR)	Q3-2024
Average Sales Price	\$5,451,286	-12.0%	\$6,193,043	-1.3%	\$5,523,071
Average Price Per Sq Ft	\$1,387	-10.1%	\$1,542	3.3%	\$1,343
Median Sales Price	\$4,325,000	-10.8%	\$4,850,000	1.8%	\$4,250,000
Number of Sales (Closed)	363	12.4%	323	3.7%	350
Days on Market (From Last List Date)	60	17.6%	51	20.0%	50
Listing Discount (From Last List Price)	7.8%		6.4%		6.9%

Luxury Condo Matrix (Top 10% of Sales)	Q3-2025	%Δ (QTR)	Q2-2025	%Δ (YR)	Q3-2024
Average Sales Price	\$2,242,886	-2.0%	\$2,288,464	5.8%	\$2,120,441
Average Price Per Sq Ft	\$1,016	-6.5%	\$1,087	3.3%	\$984
Median Sales Price	\$1,900,000	-3.8%	\$1,975,000	-3.1%	\$1,960,000
Number of Sales (Closed)	184	10.8%	166	-1.1%	186
Days on Market (From Last List Date)	55	31.0%	42	120.0%	25
Listing Discount (From Last List Price)	5.9%		3.3%		2.2%
Entry Price Threshold	\$1,535,000	-4.0%	\$1,598,800	-1.6%	\$1,560,000

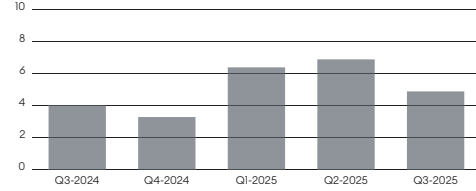
North Beaches SF Matrix	Q3-2025	%Δ (QTR)	Q2-2025	%Δ (YR)	Q3-2024
Average Sales Price	\$1,847,248	6.2%	\$1,739,538	9.6%	\$1,685,081
Average Price Per Sq Ft	\$849	2.0%	\$832	4.7%	\$811
Median Sales Price	\$1,516,500	0.8%	\$1,505,000	4.6%	\$1,449,500
Number of Sales (Closed)	316	19.2%	265	17.9%	268
Days on Market (From Last List Date)	35	29.6%	27	59.1%	22
Listing Discount (From Last List Price)	4.5%		1.9%		2.5%

North Beaches Condo Matrix	Q3-2025	%Δ (QTR)	Q2-2025	%Δ (YR)	Q3-2024
Average Sales Price	\$846,199	-1.1%	\$856,026	1.1%	\$837,303
Average Price Per Sq Ft	\$691	3.0%	\$671	2.2%	\$676
Median Sales Price	\$756,000	2.5%	\$737,500	-2.8%	\$777,500
Number of Sales (Closed)	142	18.3%	120	-2.7%	146
Days on Market (From Last List Date)	43	19.4%	36	59.3%	27
Listing Discount (From Last List Price)	4.3%		2.9%		1.7%

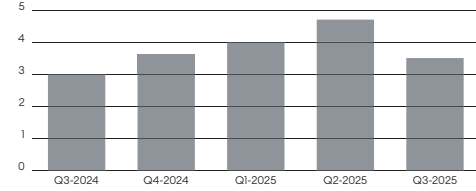
Newport Beach SF Matrix	Q3-2025	%Δ (QTR)	Q2-2025	%Δ (YR)	Q3-2024
Average Sales Price	\$5,421,664	-17.8%	\$6,596,195	-8.5%	\$5,924,614
Average Price Per Sq Ft	\$1,829	-10.7%	\$2,049	2.7%	\$1,781
Median Sales Price	\$4,425,000	-12.6%	\$5,062,500	8.1%	\$4,095,000
Number of Sales (Closed)	138	7.8%	128	-1.4%	140
Days on Market (From Last List Date)	52	26.8%	41	-3.7%	54
Listing Discount (From Last List Price)	6.2%		6.1%		9.0%

Newport Beach Condo Matrix	Q3-2025	%Δ (QTR)	Q2-2025	%Δ (YR)	Q3-2024
Average Sales Price	\$1,845,162	-10.9%	\$2,070,690	4.0%	\$1,774,677
Average Price Per Sq Ft	\$1,095	-5.8%	\$1,162	3.0%	\$1,063
Median Sales Price	\$1,562,500	-2.3%	\$1,600,000	-3.2%	\$1,614,500
Number of Sales (Closed)	64	1.6%	63	3.2%	62
Days on Market (From Last List Date)	48	9.1%	44	20.0%	40
Listing Discount (From Last List Price)	5.1%		3.7%		5.7%

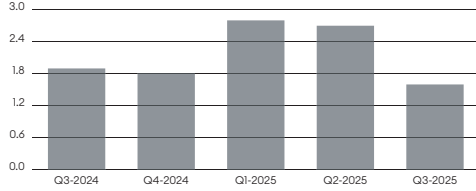
City of Irvine Single Family Months of Supply



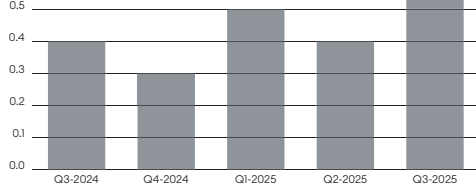
City of Irvine Condo Months of Supply



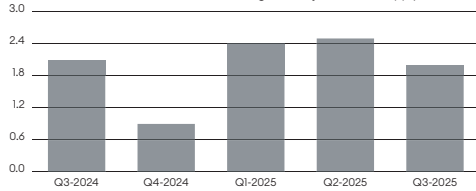
City of Laguna Beach Single Family Months of Supply



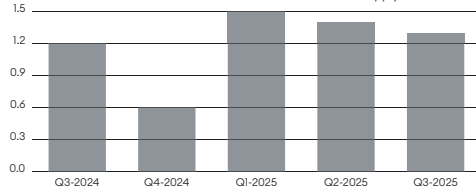
City of Laguna Beach Condo Months of Supply



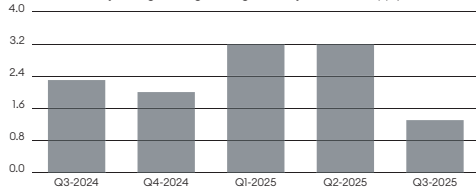
Dana Point + San Clemente Single Family Months of Supply



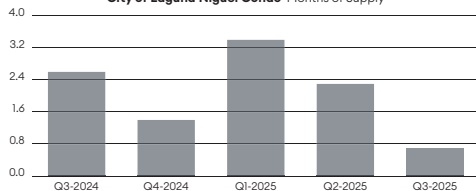
Dana Point + San Clemente Condo Months of Supply



City of Laguna Niguel Single Family Months of Supply



City of Laguna Niguel Condo Months of Supply



City of Irvine SF Matrix	Q3-2025	%Δ (QTR)	Q2-2025	%Δ (YR)	Q3-2024
Average Sales Price	\$2,357,403	-17.3%	\$2,848,854	-12.7%	\$2,698,916
Average Price Per Sq Ft	\$933	-7.6%	\$1,010	-5.3%	\$985
Median Sales Price	\$1,932,656	-21.9%	\$2,475,000	-10.1%	\$2,150,300
Number of Sales (Closed)	172	13.9%	151	17.0%	147
Days on Market (From Last List Date)	39	39.3%	28	77.3%	22
Listing Discount (From Last List Price)	6.5%		3.9%		2.0%

City of Irvine Condo Matrix	Q3-2025	%Δ (QTR)	Q2-2025	%Δ (YR)	Q3-2024
Average Sales Price	\$1,307,146	-2.0%	\$1,334,127	-6.4%	\$1,396,652
Average Price Per Sq Ft	\$748	-3.6%	\$776	-8.3%	\$816
Median Sales Price	\$1,236,875	-4.9%	\$1,300,000	-8.4%	\$1,349,800
Number of Sales (Closed)	266	14.2%	233	1.1%	263
Days on Market (From Last List Date)	46	48.4%	31	119.0%	21
Listing Discount (From Last List Price)	5.8%		2.2%		0.2%

City of Laguna Beach SF Matrix	Q3-2025	%Δ (QTR)	Q2-2025	%Δ (YR)	Q3-2024
Average Sales Price	\$2,656,324	10.0%	\$2,414,036	14.3%	\$2,324,349
Average Price Per Sq Ft	\$1,072	5.1%	\$1,020	11.2%	\$964
Median Sales Price	\$1,835,000	2.4%	\$1,792,000	1.4%	\$1,810,000
Number of Sales (Closed)	259	23.3%	210	11.2%	233
Days on Market (From Last List Date)	48	60.0%	30	45.5%	33
Listing Discount (From Last List Price)	6.6%		4.5%		4.8%

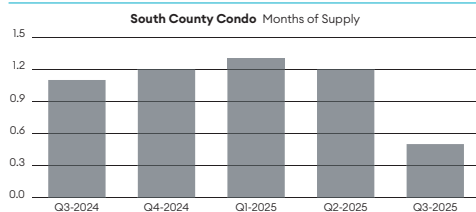
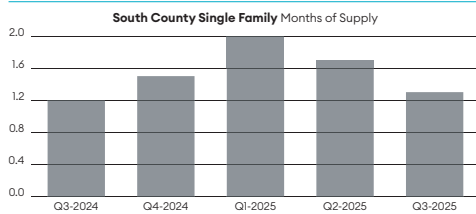
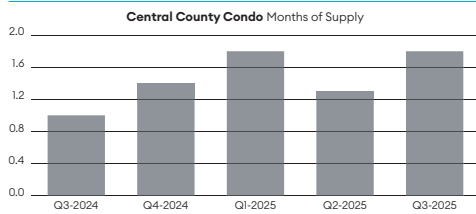
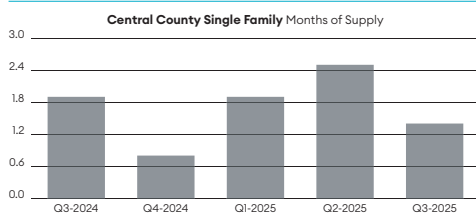
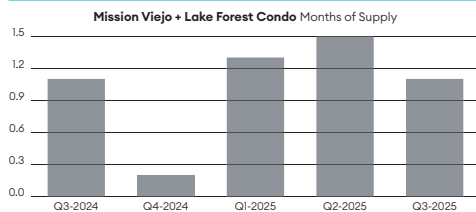
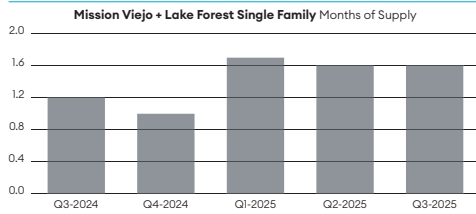
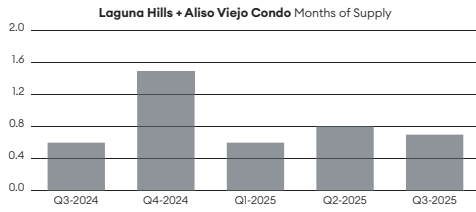
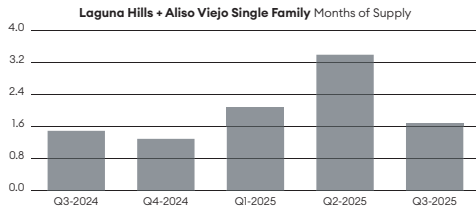
City of Laguna Beach Condo Matrix	Q3-2025	%Δ (QTR)	Q2-2025	%Δ (YR)	Q3-2024
Average Sales Price	\$940,382	-2.0%	\$959,258	6.0%	\$887,422
Average Price Per Sq Ft	\$717	-0.8%	\$723	3.6%	\$692
Median Sales Price	\$812,500	-4.2%	\$848,500	1.0%	\$804,500
Number of Sales (Closed)	152	-13.6%	176	-10.6%	170
Days on Market (From Last List Date)	37	19.4%	31	68.2%	22
Listing Discount (From Last List Price)	4.5%		3.0%		0.3%

Dana Point+San Clemente SF Matrix	Q3-2025	%Δ (QTR)	Q2-2025	%Δ (YR)	Q3-2024
Average Sales Price	\$2,499,588	-5.0%	\$2,631,824	13.8%	\$2,197,350
Average Price Per Sq Ft	\$965	-1.2%	\$977	12.3%	\$859
Median Sales Price	\$1,810,000	-7.1%	\$1,948,000	0.6%	\$1,800,000
Number of Sales (Closed)	239	-2.0%	244	-13.1%	275
Days on Market (From Last List Date)	45	32.4%	34	40.6%	32
Listing Discount (From Last List Price)	8.6%		6.2%		4.1%

Dana Point+San Clemente Condo Matrix	Q3-2025	%Δ (QTR)	Q2-2025	%Δ (YR)	Q3-2024
Average Sales Price	\$1,134,615	4.4%	\$1,087,155	17.6%	\$964,868
Average Price Per Sq Ft	\$749	3.7%	\$722	11.6%	\$671
Median Sales Price	\$915,000	-8.0%	\$995,000	7.4%	\$852,027
Number of Sales (Closed)	149	23.1%	121	8.0%	138
Days on Market (From Last List Date)	42	35.5%	31	50.0%	28
Listing Discount (From Last List Price)	5.0%		2.4%		3.1%

City of Laguna Niguel SF Matrix	Q3-2025	%Δ (QTR)	Q2-2025	%Δ (YR)	Q3-2024
Average Sales Price	\$2,077,404	5.8%	\$1,963,665	9.4%	\$1,899,712
Average Price Per Sq Ft	\$815	-2.6%	\$837	4.5%	\$780
Median Sales Price	\$1,710,000	-0.6%	\$1,720,000	-0.9%	\$1,725,000
Number of Sales (Closed)	114	28.1%	89	4.6%	109
Days on Market (From Last List Date)	40	73.9%	23	60.0%	25
Listing Discount (From Last List Price)	5.0%		2.1%		2.3%

City of Laguna Niguel Condo Matrix	Q3-2025	%Δ (QTR)	Q2-2025	%Δ (YR)	Q3-2024
Average Sales Price	\$913,413	-2.4%	\$935,724	1.3%	\$901,720
Average Price Per Sq Ft	\$680	0.3%	\$678	-4.1%	\$709
Median Sales Price	\$825,000	-2.6%	\$847,000	1.2%	\$815,000
Number of Sales (Closed)	62	-17.3%	75	24.0%	50
Days on Market (From Last List Date)	39	0.0%	39	50.0%	26
Listing Discount (From Last List Price)	3.8%		4.3%		0.1%



Laguna Hills+Aliso Viejo SF Matrix	Q3-2025	%Δ (QTR)	Q2-2025	%Δ (YR)	Q3-2024
Average Sales Price	\$1,721,159	-2.7%	\$1,768,661	3.0%	\$1,671,235
Average Price Per Sq Ft	\$708	0.4%	\$705	-0.4%	\$711
Median Sales Price	\$1,510,000	-3.4%	\$1,562,500	6.0%	\$1,424,950
Number of Sales (Closed)	74	17.5%	63	2.8%	72
Days on Market (From Last List Date)	34	47.8%	23	78.9%	19
Listing Discount (From Last List Price)	3.3%		1.1%		0.7%

Laguna Hills+Aliso Viejo Condo Matrix	Q3-2025	%Δ (QTR)	Q2-2025	%Δ (YR)	Q3-2024
Average Sales Price	\$694,720	2.0%	\$681,217	2.2%	\$679,789
Average Price Per Sq Ft	\$561	-0.4%	\$563	2.9%	\$545
Median Sales Price	\$655,000	-3.0%	\$675,000	-0.8%	\$660,000
Number of Sales (Closed)	182	-5.2%	192	-21.2%	231
Days on Market (From Last List Date)	38	40.7%	27	46.2%	26
Listing Discount (From Last List Price)	3.3%		1.6%		0.1%

Mission Viejo+Lake Forest SF Matrix	Q3-2025	%Δ (QTR)	Q2-2025	%Δ (YR)	Q3-2024
Average Sales Price	\$1,494,615	-6.6%	\$1,599,452	-6.0%	\$1,590,764
Average Price Per Sq Ft	\$673	-2.7%	\$692	0.0%	\$673
Median Sales Price	\$1,325,000	-5.2%	\$1,398,000	-3.3%	\$1,370,000
Number of Sales (Closed)	454	1.6%	447	-1.9%	463
Days on Market (From Last List Date)	36	44.0%	25	63.6%	22
Listing Discount (From Last List Price)	4.1%		1.9%		0.9%

Mission Viejo+Lake Forest Condo Matrix	Q3-2025	%Δ (QTR)	Q2-2025	%Δ (YR)	Q3-2024
Average Sales Price	\$793,156	-6.0%	\$844,218	-0.9%	\$800,209
Average Price Per Sq Ft	\$596	-3.1%	\$615	-2.8%	\$613
Median Sales Price	\$792,995	-3.3%	\$820,000	4.2%	\$761,000
Number of Sales (Closed)	204	15.3%	177	-3.8%	212
Days on Market (From Last List Date)	41	41.4%	29	86.4%	22
Listing Discount (From Last List Price)	3.5%		1.2%		0.9%

Central County SF Matrix	Q3-2025	%Δ (QTR)	Q2-2025	%Δ (YR)	Q3-2024
Average Sales Price	\$1,589,125	-1.6%	\$1,614,485	-8.2%	\$1,730,331
Average Price Per Sq Ft	\$694	-1.7%	\$706	0.1%	\$693
Median Sales Price	\$1,365,000	-6.2%	\$1,455,000	-9.0%	\$1,500,000
Number of Sales (Closed)	159	39.5%	114	6.0%	150
Days on Market (From Last List Date)	30	11.1%	27	11.1%	27
Listing Discount (From Last List Price)	2.6%		2.7%		1.4%

Central County Condo Matrix	Q3-2025	%Δ (QTR)	Q2-2025	%Δ (YR)	Q3-2024
Average Sales Price	\$891,952	-5.2%	\$941,148	1.1%	\$882,587
Average Price Per Sq Ft	\$655	-0.6%	\$659	4.0%	\$630
Median Sales Price	\$835,000	-6.7%	\$895,000	3.3%	\$808,000
Number of Sales (Closed)	59	-11.9%	67	5.4%	56
Days on Market (From Last List Date)	29	38.1%	21	70.6%	17
Listing Discount (From Last List Price)	2.0%		0.0%		-0.5%

South County SF Matrix	Q3-2025	%Δ (QTR)	Q2-2025	%Δ (YR)	Q3-2024
Average Sales Price	\$1,596,260	-7.1%	\$1,718,747	-4.2%	\$1,667,081
Average Price Per Sq Ft	\$663	-2.8%	\$682	-0.9%	\$669
Median Sales Price	\$1,362,500	-6.0%	\$1,450,000	-4.7%	\$1,430,000
Number of Sales (Closed)	472	1.1%	467	3.5%	456
Days on Market (From Last List Date)	37	27.6%	29	68.2%	22
Listing Discount (From Last List Price)	4.5%		3.1%		1.4%

South County Condo Matrix	Q3-2025	%Δ (QTR)	Q2-2025	%Δ (YR)	Q3-2024
Average Sales Price	\$799,215	-6.3%	\$852,980	-2.5%	\$819,293
Average Price Per Sq Ft	\$607	-2.6%	\$623	-1.0%	\$613
Median Sales Price	\$790,000	-5.4%	\$835,000	0.5%	\$785,847
Number of Sales (Closed)	223	4.7%	213	2.8%	217
Days on Market (From Last List Date)	41	46.4%	28	70.8%	24
Listing Discount (From Last List Price)	3.6%		1.3%		1.1%

Questions or comments? Email report author
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Methodology: millersamuel.com/research-reports/methodology

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