

# Elliman Report

## Q4-2025 Orange County, CA Sales

### Single Family & Condo Dashboard

YEAR-OVER-YEAR

**+ 3.9%**  
Prices  
Median Sales Price

**+ 0.3 mos**  
Pace  
Months of Supply

**+ 0.3%**  
Sales  
Closed Sales

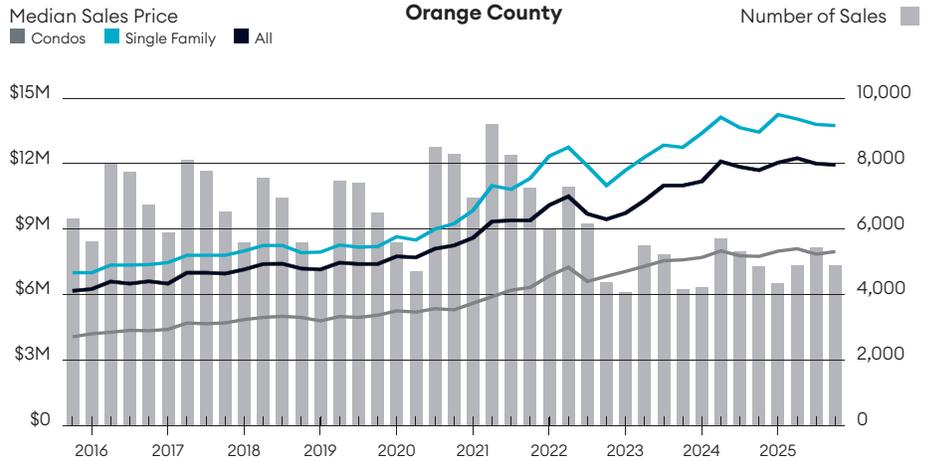
**+ 16.3%**  
Inventory  
Total Inventory

**+ 10 days**  
Marketing Time  
Days on Market

**+ 1.1%**  
Negotiability  
Listing Discount

- All price trend indicators rose collectively for the tenth time from the year-ago quarter
- Sales increased year over year for the seventh time in eight quarters
- Bidding wars accounted for nearly one in four sales, but it was still the lowest market share in six years

Finance (Sales Share)	Current Quarter	Prior Year Quarter
Single Family Cash	44.7%	47.2%
Single Family Mortgage	55.3%	52.8%
Condo Cash	43.6%	43.0%
Condo Mortgage	56.4%	56.9%



Orange County Matrix	Q4-2025	%Δ (QTR)	Q3-2025	%Δ (YR)	Q4-2024
Average Sales Price	\$1,532,962	0.2%	\$1,529,398	3.9%	\$1,474,761
Average Price Per Sq Ft	\$791	-0.3%	\$793	2.5%	\$772
Median Sales Price	\$1,195,000	-0.4%	\$1,200,000	2.1%	\$1,170,300
Number of Sales (Closed)	4,868	-10.1%	5,415	0.3%	4,853
Days on Market (From Last List Date)	42	16.7%	36	31.3%	32
Listing Discount (From Last List Price)	4.6%		4.5%		3.5%
Listing Inventory	2,888	-25.3%	3,865	16.3%	2,483
Months of Supply	1.8	-14.3%	2.1	20.0%	1.5
Average Square Feet	1,938	0.5%	1,929	1.5%	1,910

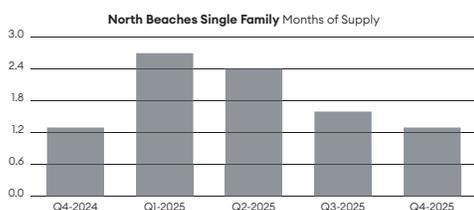
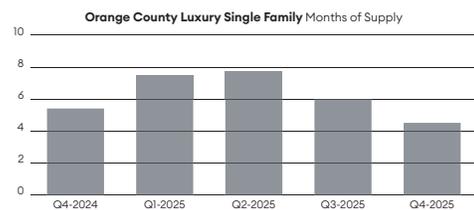
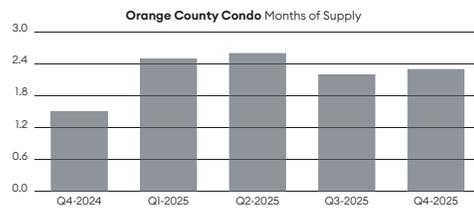
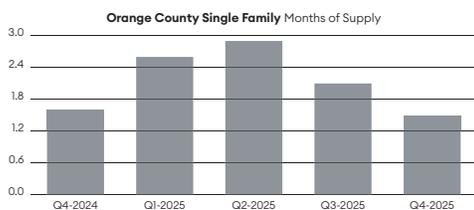
Year-to-Date	Q4-2025	%Δ (QTR)	Q3-2025	%Δ (YR)	Q4-2024
Average Sales Price (YTD)	\$1,566,173	N/A	N/A	3.8%	\$1,508,827
Average Price per Sq Ft (YTD)	\$804	N/A	N/A	3.9%	\$774
Median Sales Price (YTD)	\$1,200,000	N/A	N/A	1.8%	\$1,178,335
Number of Sales (YTD)	19,512	N/A	N/A	-2.8%	20,068

Days on Market (Sales Share)	Current Quarter	Prior Year Quarter
Single Family ≤ 30 Days	58.6%	63.7%
Single Family 31-60 Days	18.5%	19.2%
Single Family > 60 Days	22.9%	17.1%
Condo ≤ 30 Days	50.2%	63.8%
Condo 31-60 Days	22.6%	21.7%
Condo > 60 Days	27.2%	14.5%

Over/Under Last List (Sales Share)	Current Quarter	Prior Year Quarter
Single Family Over	27.7%	35.5%
Single Family At	8.8%	9.2%
Single Family Under	63.5%	55.3%
Condo Over	16.2%	29.7%
Condo At	12.5%	13.0%
Condo Under	71.3%	57.3%

All price trend indicators continued to rise annually despite the listing inventory increasing more than sales. The median sales price increased by 2.1% to \$1,195,000, as the other two overall price trend indicators followed the same pattern. Sales edged 0.3% higher to 4,868 for the seventh year over year increase over the past eight quarters. Listing inventory expanded by 16.3% to 2,888 from the same period last year, but remained inadequate to meet demand, as evidenced by the 23.7% market share of bidding wars.





Single Family Matrix	Q4-2025	%Δ (QTR)	Q3-2025	%Δ (YR)	Q4-2024
Average Sales Price	\$1,840,332	0.3%	\$1,834,037	4.7%	\$1,756,977
Average Price Per Sq Ft	\$826	-0.2%	\$828	3.1%	\$801
Median Sales Price	\$1,374,999	-0.4%	\$1,380,000	2.2%	\$1,345,000
Number of Sales (Closed)	3,201	-10.8%	3,587	0.8%	3,175
Days on Market (From Last List Date)	41	20.6%	34	24.2%	33
Listing Discount (From Last List Price)	4.8%		4.6%		3.7%

Condo Matrix	Q4-2025	%Δ (QTR)	Q3-2025	%Δ (YR)	Q4-2024
Average Sales Price	\$942,746	1.2%	\$931,620	0.2%	\$940,773
Average Price Per Sq Ft	\$683	0.3%	\$681	-0.4%	\$686
Median Sales Price	\$797,000	1.5%	\$785,000	2.8%	\$775,000
Number of Sales (Closed)	1,667	-8.8%	1,828	-0.7%	1,678
Days on Market (From Last List Date)	45	12.5%	40	45.2%	31
Listing Discount (From Last List Price)	3.9%		4.0%		2.5%

Luxury Single Family Matrix (Top 10% of Sales)	Q4-2025	%Δ (QTR)	Q3-2025	%Δ (YR)	Q4-2024
Average Sales Price	\$5,456,910	0.1%	\$5,451,286	8.1%	\$5,049,725
Average Price Per Sq Ft	\$1,418	2.2%	\$1,387	8.4%	\$1,308
Median Sales Price	\$4,400,000	1.7%	\$4,325,000	7.6%	\$4,090,000
Number of Sales (Closed)	321	-11.6%	363	0.9%	318
Days on Market (From Last List Date)	64	6.7%	60	10.3%	58
Listing Discount (From Last List Price)	7.9%		7.8%		7.3%
Entry Price Threshold	\$3,195,000	6.5%	\$3,000,000	9.5%	\$2,918,964

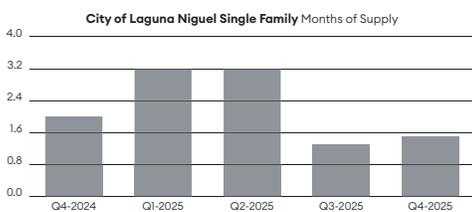
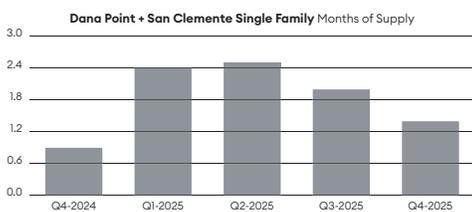
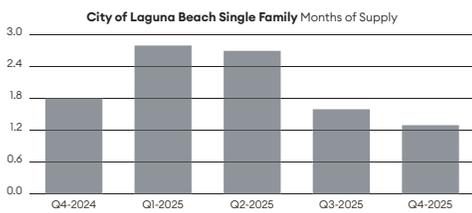
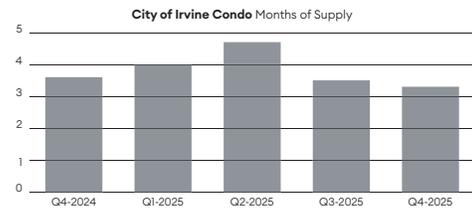
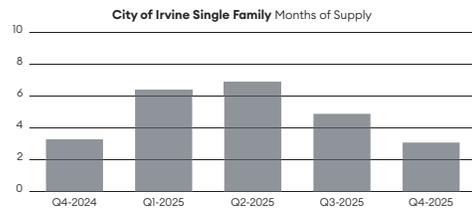
Luxury Condo Matrix (Top 10% of Sales)	Q4-2025	%Δ (QTR)	Q3-2025	%Δ (YR)	Q4-2024
Average Sales Price	\$2,244,721	0.1%	\$2,242,886	-5.0%	\$2,363,036
Average Price Per Sq Ft	\$1,047	3.1%	\$1,016	-0.8%	\$1,055
Median Sales Price	\$1,898,000	-0.1%	\$1,900,000	-1.5%	\$1,927,500
Number of Sales (Closed)	167	-9.2%	184	-0.6%	168
Days on Market (From Last List Date)	50	-9.1%	55	11.1%	45
Listing Discount (From Last List Price)	4.5%		5.9%		5.1%
Entry Price Threshold	\$1,537,000	0.1%	\$1,535,000	2.5%	\$1,499,990

North Beaches SF Matrix	Q4-2025	%Δ (QTR)	Q3-2025	%Δ (YR)	Q4-2024
Average Sales Price	\$1,765,637	-4.4%	\$1,847,248	0.4%	\$1,757,935
Average Price Per Sq Ft	\$849	0.0%	\$849	3.7%	\$819
Median Sales Price	\$1,500,000	-1.1%	\$1,516,500	-2.6%	\$1,540,000
Number of Sales (Closed)	253	-19.9%	316	-11.5%	286
Days on Market (From Last List Date)	41	17.1%	35	20.6%	34
Listing Discount (From Last List Price)	3.7%		4.5%		3.1%

North Beaches Condo Matrix	Q4-2025	%Δ (QTR)	Q3-2025	%Δ (YR)	Q4-2024
Average Sales Price	\$845,340	-0.1%	\$846,199	5.1%	\$804,330
Average Price Per Sq Ft	\$653	-5.5%	\$691	-3.1%	\$674
Median Sales Price	\$760,000	0.5%	\$756,000	6.3%	\$715,000
Number of Sales (Closed)	137	-3.5%	142	-1.4%	139
Days on Market (From Last List Date)	44	2.3%	43	33.3%	33
Listing Discount (From Last List Price)	3.6%		4.3%		2.3%

Newport Beach SF Matrix	Q4-2025	%Δ (QTR)	Q3-2025	%Δ (YR)	Q4-2024
Average Sales Price	\$5,230,317	-3.5%	\$5,421,664	-0.9%	\$5,277,348
Average Price Per Sq Ft	\$1,733	-5.2%	\$1,829	6.7%	\$1,624
Median Sales Price	\$4,225,000	-4.5%	\$4,425,000	3.0%	\$4,100,000
Number of Sales (Closed)	135	-2.2%	138	3.1%	131
Days on Market (From Last List Date)	56	7.7%	52	1.8%	55
Listing Discount (From Last List Price)	7.3%		6.2%		7.8%

Newport Beach Condo Matrix	Q4-2025	%Δ (QTR)	Q3-2025	%Δ (YR)	Q4-2024
Average Sales Price	\$2,172,475	17.7%	\$1,845,162	-11.4%	\$2,452,241
Average Price Per Sq Ft	\$1,235	12.8%	\$1,095	3.4%	\$1,194
Median Sales Price	\$1,800,000	15.2%	\$1,562,500	-5.3%	\$1,899,750
Number of Sales (Closed)	53	-17.2%	64	32.5%	40
Days on Market (From Last List Date)	42	-12.5%	48	10.5%	38
Listing Discount (From Last List Price)	2.9%		5.1%		5.0%



City of Irvine SF Matrix	Q4-2025	%Δ (QTR)	Q3-2025	%Δ (YR)	Q4-2024
Average Sales Price	\$2,632,251	11.7%	\$2,357,403	3.4%	\$2,544,666
Average Price Per Sq Ft	\$932	-0.1%	\$933	-1.6%	\$947
Median Sales Price	\$2,299,000	19.0%	\$1,932,656	2.2%	\$2,250,000
Number of Sales (Closed)	161	-6.4%	172	8.1%	149
Days on Market (From Last List Date)	54	38.5%	39	42.1%	38
Listing Discount (From Last List Price)	6.4%		6.5%		4.8%

City of Irvine Condo Matrix	Q4-2025	%Δ (QTR)	Q3-2025	%Δ (YR)	Q4-2024
Average Sales Price	\$1,289,181	-1.4%	\$1,307,146	-6.8%	\$1,383,166
Average Price Per Sq Ft	\$737	-1.5%	\$748	-8.0%	\$801
Median Sales Price	\$1,250,000	1.1%	\$1,236,875	-5.7%	\$1,325,000
Number of Sales (Closed)	251	-5.6%	266	2.9%	244
Days on Market (From Last List Date)	50	8.7%	46	42.9%	35
Listing Discount (From Last List Price)	5.3%		5.8%		3.5%

City of Laguna Beach SF Matrix	Q4-2025	%Δ (QTR)	Q3-2025	%Δ (YR)	Q4-2024
Average Sales Price	\$2,339,145	-11.9%	\$2,656,324	-5.2%	\$2,467,023
Average Price Per Sq Ft	\$1,022	-4.7%	\$1,072	-0.7%	\$1,029
Median Sales Price	\$1,870,000	1.9%	\$1,835,000	3.9%	\$1,800,000
Number of Sales (Closed)	225	-13.1%	259	14.8%	196
Days on Market (From Last List Date)	53	10.4%	48	23.3%	43
Listing Discount (From Last List Price)	7.7%		6.6%		5.5%

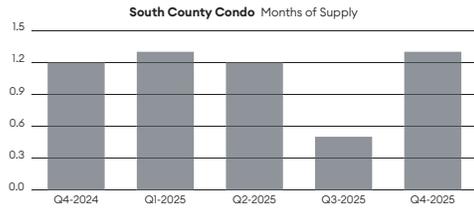
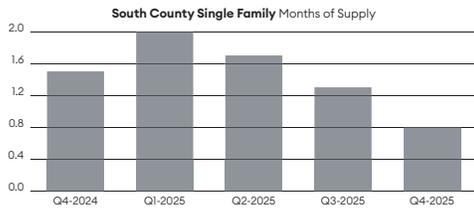
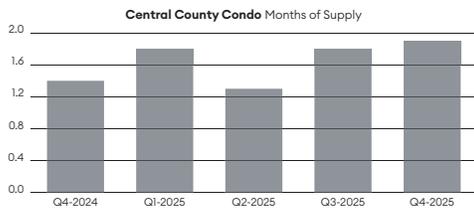
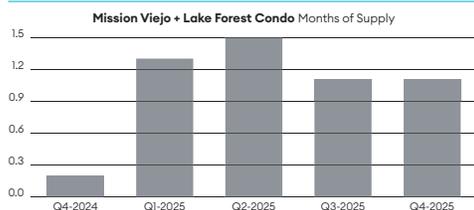
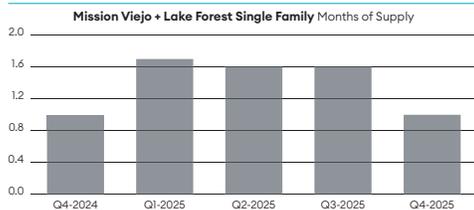
City of Laguna Beach Condo Matrix	Q4-2025	%Δ (QTR)	Q3-2025	%Δ (YR)	Q4-2024
Average Sales Price	\$913,688	-2.8%	\$940,382	9.1%	\$837,519
Average Price Per Sq Ft	\$719	0.3%	\$717	5.4%	\$682
Median Sales Price	\$800,000	-1.5%	\$812,500	3.9%	\$770,000
Number of Sales (Closed)	170	11.8%	152	4.3%	163
Days on Market (From Last List Date)	43	16.2%	37	34.4%	32
Listing Discount (From Last List Price)	4.1%		4.5%		3.1%

Dana Point+San Clemente SF Matrix	Q4-2025	%Δ (QTR)	Q3-2025	%Δ (YR)	Q4-2024
Average Sales Price	\$2,474,943	-1.0%	\$2,499,588	16.6%	\$2,123,150
Average Price Per Sq Ft	\$940	-2.6%	\$965	7.3%	\$876
Median Sales Price	\$1,825,000	0.8%	\$1,810,000	7.4%	\$1,699,500
Number of Sales (Closed)	219	-8.4%	239	-3.9%	228
Days on Market (From Last List Date)	49	8.9%	45	16.7%	42
Listing Discount (From Last List Price)	6.4%		8.6%		4.9%

Dana Point+San Clemente Condo Matrix	Q4-2025	%Δ (QTR)	Q3-2025	%Δ (YR)	Q4-2024
Average Sales Price	\$1,020,307	-10.1%	\$1,134,615	-6.6%	\$1,092,417
Average Price Per Sq Ft	\$722	-3.6%	\$749	-0.3%	\$724
Median Sales Price	\$921,200	0.7%	\$915,000	1.8%	\$905,000
Number of Sales (Closed)	119	-20.1%	149	0.0%	119
Days on Market (From Last List Date)	48	14.3%	42	23.1%	39
Listing Discount (From Last List Price)	3.9%		5.0%		1.9%

City of Laguna Niguel SF Matrix	Q4-2025	%Δ (QTR)	Q3-2025	%Δ (YR)	Q4-2024
Average Sales Price	\$1,827,722	-12.0%	\$2,077,404	-2.5%	\$1,874,899
Average Price Per Sq Ft	\$803	-1.5%	\$815	1.0%	\$795
Median Sales Price	\$1,633,750	-4.5%	\$1,710,000	-4.6%	\$1,712,500
Number of Sales (Closed)	96	-15.8%	114	17.1%	82
Days on Market (From Last List Date)	44	10.0%	40	7.3%	41
Listing Discount (From Last List Price)	4.4%		5.0%		4.0%

City of Laguna Niguel Condo Matrix	Q4-2025	%Δ (QTR)	Q3-2025	%Δ (YR)	Q4-2024
Average Sales Price	\$933,020	2.1%	\$913,413	19.0%	\$783,899
Average Price Per Sq Ft	\$687	1.0%	\$680	2.4%	\$671
Median Sales Price	\$850,000	3.0%	\$825,000	16.4%	\$730,050
Number of Sales (Closed)	65	4.8%	62	12.1%	58
Days on Market (From Last List Date)	47	20.5%	39	56.7%	30
Listing Discount (From Last List Price)	3.6%		3.8%		1.9%



Laguna Hills+Aliso Viejo SF Matrix	Q4-2025	%Δ (QTR)	Q3-2025	%Δ (YR)	Q4-2024
Average Sales Price	\$1,581,999	-8.1%	\$1,721,159	-8.4%	\$1,727,325
Average Price Per Sq Ft	\$710	0.3%	\$708	-1.0%	\$717
Median Sales Price	\$1,380,000	-8.6%	\$1,510,000	-10.4%	\$1,540,000
Number of Sales (Closed)	63	-14.9%	74	0.0%	63
Days on Market (From Last List Date)	33	-2.9%	34	6.5%	31
Listing Discount (From Last List Price)	2.9%		3.3%		2.7%

Laguna Hills+Aliso Viejo Condo Matrix	Q4-2025	%Δ (QTR)	Q3-2025	%Δ (YR)	Q4-2024
Average Sales Price	\$703,212	1.2%	\$694,720	0.1%	\$702,276
Average Price Per Sq Ft	\$579	3.2%	\$561	1.2%	\$572
Median Sales Price	\$690,000	5.3%	\$655,000	2.6%	\$672,500
Number of Sales (Closed)	181	-0.5%	182	4.0%	174
Days on Market (From Last List Date)	43	13.2%	38	53.6%	28
Listing Discount (From Last List Price)	3.0%		3.3%		1.3%

Mission Viejo+Lake Forest SF Matrix	Q4-2025	%Δ (QTR)	Q3-2025	%Δ (YR)	Q4-2024
Average Sales Price	\$1,536,485	2.8%	\$1,494,615	-2.6%	\$1,577,481
Average Price Per Sq Ft	\$665	-1.2%	\$673	-4.0%	\$693
Median Sales Price	\$1,370,000	3.4%	\$1,325,000	3.2%	\$1,327,750
Number of Sales (Closed)	413	-9.0%	454	13.5%	364
Days on Market (From Last List Date)	46	27.8%	36	31.4%	35
Listing Discount (From Last List Price)	4.6%		4.1%		3.4%

Mission Viejo+Lake Forest Condo Matrix	Q4-2025	%Δ (QTR)	Q3-2025	%Δ (YR)	Q4-2024
Average Sales Price	\$789,793	-0.4%	\$793,156	-1.7%	\$803,209
Average Price Per Sq Ft	\$593	-0.5%	\$596	-1.0%	\$599
Median Sales Price	\$795,000	0.3%	\$792,995	3.7%	\$766,500
Number of Sales (Closed)	185	-9.3%	204	-3.6%	192
Days on Market (From Last List Date)	47	14.6%	41	46.9%	32
Listing Discount (From Last List Price)	2.9%		3.5%		1.7%

Central County SF Matrix	Q4-2025	%Δ (QTR)	Q3-2025	%Δ (YR)	Q4-2024
Average Sales Price	\$1,514,918	-4.7%	\$1,589,125	-0.3%	\$1,519,080
Average Price Per Sq Ft	\$668	-3.7%	\$694	1.8%	\$656
Median Sales Price	\$1,325,000	-2.9%	\$1,365,000	-3.6%	\$1,375,000
Number of Sales (Closed)	133	-16.4%	159	0.0%	133
Days on Market (From Last List Date)	34	13.3%	30	6.3%	32
Listing Discount (From Last List Price)	3.9%		2.6%		3.5%

Central County Condo Matrix	Q4-2025	%Δ (QTR)	Q3-2025	%Δ (YR)	Q4-2024
Average Sales Price	\$861,466	-3.4%	\$891,952	-3.3%	\$890,990
Average Price Per Sq Ft	\$637	-2.7%	\$655	0.2%	\$636
Median Sales Price	\$822,500	-1.5%	\$835,000	6.1%	\$775,000
Number of Sales (Closed)	50	-15.3%	59	-2.0%	51
Days on Market (From Last List Date)	35	20.7%	29	45.8%	24
Listing Discount (From Last List Price)	2.2%		2.0%		0.5%

South County SF Matrix	Q4-2025	%Δ (QTR)	Q3-2025	%Δ (YR)	Q4-2024
Average Sales Price	\$1,624,159	1.7%	\$1,596,260	-0.3%	\$1,629,360
Average Price Per Sq Ft	\$657	-0.9%	\$663	-4.2%	\$686
Median Sales Price	\$1,399,000	2.7%	\$1,362,500	1.4%	\$1,380,000
Number of Sales (Closed)	436	-7.6%	472	13.8%	383
Days on Market (From Last List Date)	47	27.0%	37	23.7%	38
Listing Discount (From Last List Price)	4.8%		4.5%		3.8%

South County Condo Matrix	Q4-2025	%Δ (QTR)	Q3-2025	%Δ (YR)	Q4-2024
Average Sales Price	\$789,674	-1.2%	\$799,215	-3.5%	\$818,166
Average Price Per Sq Ft	\$602	-0.8%	\$607	-1.1%	\$609
Median Sales Price	\$785,000	-0.6%	\$790,000	0.6%	\$780,000
Number of Sales (Closed)	187	-16.1%	223	-9.7%	207
Days on Market (From Last List Date)	48	17.1%	41	45.5%	33
Listing Discount (From Last List Price)	3.2%		3.6%		1.8%

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

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