

February 2026 County Sales and Price Activity (and condo sales data not seasonally adjusted)

February 2026	Median Sold Price of Existing Single-Family Homes						Sales	
State/Region/County	February 2026	January 2026	February 2025	Price MTM% Chg	Price YTY% Chg	Sales MTM% Chg	Sales YTY% Chg	
CA Single-family home	\$830,370	\$822,630	\$829,060	0.9%	0.2%	7.0%	-0.3%	
CA Condo/Townhome	\$645,000	\$625,000	\$675,000	3.2%	-4.4%	28.0%	1.2%	
L.A. Metro Area	\$812,950	\$808,000	\$824,880	0.6%	-1.4%	11.5%	-1.8%	
Central Coast	\$1,047,500	\$1,091,180	\$1,039,500	-4.0%	0.8%	21.2%	6.2%	
Central Valley	\$485,000	\$480,000	\$495,000	1.0%	-2.0%	15.4%	0.6%	
Far North	\$378,000	\$379,950	\$386,000	-0.5%	-2.1%	-12.6%	-2.9%	
Inland Empire	\$601,350	\$595,000	\$611,290	1.1%	-1.6%	9.0%	-3.7%	
S.F. Bay Area	\$1,285,000	\$1,127,000	\$1,250,000	14.0%	2.8%	44.1%	4.0%	
Southern California	\$861,880	\$845,530	\$866,360	1.9%	-0.5%	13.7%	-0.6%	
S.F. Bay Area								
Alameda	\$1,303,500	\$1,120,010	\$1,300,000	16.4%	0.3%	33.8%	-4.5%	
Contra Costa	\$819,000	\$802,000	\$841,000	2.1%	-2.6%	31.2%	0.0%	
Marin	\$1,575,000	\$1,527,000	\$1,675,000	3.1%	-6.0%	58.3%	17.3%	
Napa	\$837,000	\$1,002,500	\$1,018,500	-16.5%	-17.8%	30.0%	18.2%	
San Francisco	\$1,976,000	\$1,653,320	\$1,600,000	19.5%	23.5%	93.3%	4.3%	
San Mateo	\$2,250,000	\$2,000,000	\$2,200,000	12.5%	2.3%	39.9%	12.9%	
Santa Clara	\$2,016,000	\$1,807,500	\$2,000,000	11.5%	0.8%	70.1%	13.7%	
Solano	\$565,400	\$552,500	\$600,000	2.3%	-5.8%	41.4%	0.4%	
Sonoma	\$809,500	\$799,000	\$852,560	1.3%	-5.1%	28.3%	0.0%	
Southern California								

Imperial	\$447,500	\$455,000	\$394,000	-1.6%	13.6%	22.9%	-10.4%
Los Angeles	\$842,660	\$879,720	\$852,190	-4.2%	-1.1%	14.2%	-0.3%
Orange	\$1,432,500	\$1,410,000	\$1,465,500	1.6%	-2.3%	9.3%	-3.6%
Riverside	\$631,000	\$639,440	\$646,840	-1.3%	-2.4%	20.4%	-4.0%
San Bernardino	\$510,000	\$500,990	\$490,000	1.8%	4.1%	-14.7%	0.5%
San Diego	\$1,050,000	\$1,050,000	\$1,040,000	0.0%	1.0%	22.2%	4.6%
Ventura	\$930,000	\$917,500	\$969,500	1.4%	-4.1%	16.8%	7.3%
Central Coast							
Monterey	\$880,000	\$998,750	\$900,000	-11.9%	-2.2%	17.3%	7.5%
San Luis Obispo	\$990,000	\$950,000	\$967,500	4.2%	2.3%	15.1%	-5.8%
Santa Barbara	\$1,215,000	\$1,475,000	\$1,515,000	-17.6%	-19.8%	15.5%	-0.7%
Santa Cruz	\$1,275,000	\$1,237,500	\$1,260,000	3.0%	1.2%	53.6%	53.6%
Central Valley							
Fresno	\$426,250	\$429,990	\$442,850	-0.9%	-3.7%	27.7%	8.3%
Glenn	\$370,000	\$340,000	\$335,000	8.8%	10.4%	100.0%	40.0%
Kern	\$410,000	\$398,220	\$409,900	3.0%	0.0%	5.9%	-12.4%
Kings	\$356,990	\$383,000	\$375,000	-6.8%	-4.8%	0.0%	23.3%
Madera	\$435,000	\$412,000	\$425,000	5.6%	2.4%	64.4%	-9.3%
Merced	\$402,990	\$409,750	\$414,500	-1.6%	-2.8%	23.9%	38.3%
Placer	\$639,980	\$625,000	\$649,000	2.4%	-1.4%	16.7%	-4.2%
Sacramento	\$545,000	\$540,000	\$550,000	0.9%	-0.9%	20.7%	8.0%
San Benito	\$821,000	\$859,900	\$780,000	-4.5%	5.3%	12.0%	3.7%
San Joaquin	\$525,000	\$530,000	\$540,000	-0.9%	-2.8%	11.8%	-15.1%
Stanislaus	\$462,500	\$477,000	\$460,000	-3.0%	0.5%	1.4%	8.0%
Tulare	\$381,000	\$375,000	\$380,000	1.6%	0.3%	-8.8%	-8.3%

Far North							
Butte	\$435,750	\$445,000	\$449,000	-2.1%	-3.0%	-7.7%	-17.8%
Lassen	\$199,000	\$255,000	\$284,500	-22.0%	-30.1%	-10.0%	12.5%
Plumas	\$485,000	\$350,000	\$359,500	38.6%	34.9%	-28.6%	-28.6%
Shasta	\$386,500	\$386,000	\$386,000	0.1%	0.1%	-6.6%	5.2%
Siskiyou	\$285,000	\$359,000	\$285,000	-20.6%	0.0%	-9.5%	-20.8%
Tehama	\$323,630	\$347,000	\$360,000	-6.7%	-10.1%	-37.5%	53.8%
Trinity	\$374,250	\$290,000	\$115,000	29.1%	225.4%	-50.0%	-20.0%
Other Calif. Counties							
Amador	\$445,000	\$430,000	\$460,000	3.5%	-3.3%	22.2%	-15.4%
Calaveras	\$452,920	\$475,000	r \$415,000	-4.6%	9.1%	2.3%	7.1%
Del Norte	\$335,000	\$460,000	\$352,000	-27.2%	-4.8%	66.7%	25.0%
El Dorado	\$700,000	\$705,380	\$677,000	-0.8%	3.4%	17.7%	-11.0%
Humboldt	\$430,000	\$384,000	\$431,000	12.0%	-0.2%	-21.5%	-15.1%
Lake	\$338,950	\$312,000	\$352,500	8.6%	-3.8%	25.0%	-13.0%
Mariposa	\$520,000	\$369,750	\$410,000	40.6%	26.8%	-8.3%	57.1%
Mendocino	\$481,500	\$480,000	\$535,500	0.3%	-10.1%	0.0%	18.5%
Mono	\$2,350,000	\$1,564,500	\$1,350,000	50.2%	74.1%	-50.0%	-57.1%
Nevada	\$532,000	\$578,500	\$512,950	-8.0%	3.7%	1.5%	11.3%
Sutter	\$464,040	\$460,000	\$417,500	0.9%	11.1%	25.9%	-19.0%
Tuolumne	\$362,500	\$420,000	\$381,000	-13.7%	-4.9%	-10.2%	7.3%
Yolo	\$600,000	\$559,200	\$633,500	7.3%	-5.3%	0.0%	-10.8%
Yuba	\$430,000	\$449,950	\$459,000	-4.4%	-6.3%	32.5%	-18.5%

r = revised

NA = not available

California home sales, prices rise in February as mortgage rates ease, C.A.R. reports

- Existing, single-family home sales totaled 274,820 in February on a seasonally adjusted annualized rate, up 7.0 percent from 256,910 in January and down 0.3 percent from 275,600 in February 2025.
- February's statewide median home price was \$830,370, up 0.9 percent from \$822,630 in January and up from \$829,060 in February 2025.
- Year-to-date statewide home sales were down 0.7 percent in February.

SACRAMENTO (March 17) – California home sales perked higher in February as slightly more favorable mortgage rates improved affordability and encouraged more buyers to reenter the market, the **CALIFORNIA ASSOCIATION OF REALTORS**® (C.A.R.) said today.

Closed escrow sales of existing, single-family detached homes in California reached a seasonally adjusted annualized rate of 274,820 in February, according to data collected by C.A.R. from more than 90 local REALTOR® associations and MLSs statewide. This annualized figure reflects the number of homes that would be sold in 2026 if February's sales pace continued throughout the year, with adjustments made for typical seasonal patterns. February sales were up from 256,910 in January and down 0.3 percent from 275,600 in February 2025.

Despite the uptick, the streak of sub-300,000 seasonally adjusted annualized sales continued for the 41st consecutive month, underscoring the market's persistent weakness over the past few years. While the stronger-than-usual, month-to-month increase in pending sales provides some hope that closed transactions could improve in March, the recent spike in mortgage rates may dampen buyer momentum and keep sales activity subdued in the near term.

“Following a soft start to the year, the housing market regained momentum in February, with both sales and prices showing solid gains,” said 2026 C.A.R. President Tamara Suminski, a Southern California broker and REALTOR®. “The conflict in the Middle East is creating some uncertainty for the broader economy and financial markets, which could lead to some short-term hesitation in the housing market. We remain hopeful though that the situation will stabilize in the weeks ahead, allowing market fundamentals and buyer and seller confidence to reassert themselves.”

California's median home price increased in February from both the prior month and year ago, bouncing back to \$830,370 from a 23-month low reached a month ago. The statewide median price rose 0.9 percent from January, outpacing the long-run average of -0.3 percent observed between January and February. On a year-over-year basis, the median price rose following two consecutive months of annual declines and posted its best growth rate in five months. While prices are expected to climb as the market approaches the spring homebuying season, lingering concerns about the broader economy and the market condition could constrain the pace of price gains in the months ahead.

“While mortgage rates remain below year-ago levels, they recently jumped to their highest level in seven months and could temper buyer momentum as we head into the spring homebuying season,” said C.A.R. Senior Vice President and Chief Economist Jordan Levine. “However, many homeowners remain locked in to historically low rates, and inventory remains tight, so any stabilization in rates could help bolster home prices in the spring market despite ongoing affordability and economic challenges.”

Other key points from C.A.R.’s February 2026 resale housing report include:

- At the regional level, three of California’s five major regions recorded year-over-year increases in non-seasonally adjusted home sales. The Central Coast led with a solid 6.2 percent gain from a year earlier, followed by the San Francisco Bay Area (4.0 percent) and the Central Valley (0.6 percent). Meanwhile, the Far North posted a modest sales decline, falling 2.9 percent from its year-ago level, followed by Southern California (-0.6 percent).
- At the county level, 27 of the 53 counties tracked by C.A.R. posted year-over-year sales gains in February, with 14 recording double-digit increases. Mariposa led with a 57.1 percent increase from a year earlier, followed by Tehama (53.8 percent) and Santa Cruz (53.6 percent). Meanwhile, sales in two counties, Contra Costa and Sonoma, remained flat, and 24 counties experienced annual sales declines, including 15 that fell by more than 10 percent. Mono led the pack with a -57.1 percent drop, Plumas (-28.6 percent) having the second biggest drop, and Siskiyou (-20.8 percent) recording the third largest dip.
- Only two of California’s five major regions recorded year-over-year median home price growth. The San Francisco Bay Area led with a 2.8 percent gain from February 2025, followed by the Central Coast with a 0.8 percent increase. In contrast, the Far North recorded the largest annual decline at 2.1 percent, followed by the Central Valley (-2.0 percent) and Southern California (-0.5 percent).
- At the county level, 24 of the 53 counties tracked by C.A.R. recorded year-over-year median home price increases. Trinity led with a 225.4 percent increase, followed by Mono (74.1 percent); the gains in both counties largely reflected a shift in the mix of homes sold, which skewed the upturn in their median prices. Plumas ranked third with a solid annual growth rate of 34.9 percent. Conversely, 28 counties registered price declines from a year earlier, while Siskiyou remained unchanged. Lassen recorded the steepest price drop (-30.1 percent), followed by Santa Barbara (-19.8 percent) and Napa (-17.8 percent), underscoring continued price softness in many markets across the state.
- Housing inventory pulled back in February, receding from the prior month and staying unchanged from a year earlier as slower market activity and growing economic uncertainty weighed on seller confidence. The Unsold Inventory Index was 4.0 months in February, down from 4.4 months in January and unchanged from February 2025. While total active listings increased from the previous month, they fell from a year ago for the first time in 25 months. With the streak of inventory expansion broken in February, the first dip in supply in slightly more than two years suggests that some homeowners may be delaying their listing decisions as mortgage rates continue to climb amid a tense geopolitical environment that has clouded the near-term economic outlook. As a result, while the number of properties for sale remains relatively high

compared to levels observed a couple of years ago, the housing supply growth rate may begin to moderate in the months ahead.

- The median number of days it took to sell a California single-family home was 29 days in February, up from 26 days in February 2025.
- C.A.R.'s statewide sales-price-to-list-price ratio* was 99.3 percent in February 2026 and 98.0 percent in February 2025.
- The statewide median price per square foot** for an existing single-family home was \$424, up from \$421 in February a year ago.
- The 30-year, fixed-mortgage interest rate averaged 6.05 percent in February, down from 6.84 percent in February 2025, according to C.A.R.'s calculations based on Freddie Mac's weekly mortgage survey data.

Note: The County MLS median price and sales data in the tables are generated from a survey of more than 90 associations of REALTORS® throughout the state and represent statistics of existing single-family detached homes only. County sales data is not adjusted to account for seasonal factors that can influence home sales. Movements in sales prices should not be interpreted as changes in the cost of a standard home. The median price is where half sold for more and half sold for less; medians are more typical than average prices, which are skewed by a relatively small share of transactions at either the lower end or the upper end. Median prices can be influenced by changes in cost, as well as changes in the characteristics and the size of homes sold. The change in median prices should not be construed as actual price changes in specific homes.

*Sales-to-list-price ratio is an indicator that reflects the negotiation power of home buyers and home sellers under current market conditions. The ratio is calculated by dividing the final sales price of a property by its original list price and is expressed as a percentage. A sales-to-list ratio with 100 percent or above suggests that the property sold for more than the list price, and a ratio below 100 percent indicates that the price sold below the asking price.

**Price per square foot is a measure commonly used by real estate agents and brokers to determine how much a square foot of space a buyer will pay for a property. It is calculated as the sale price of the home divided by the number of finished square feet. C.A.R. currently tracks price-per-square foot statistics for 53 counties.

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