

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

March 2026		Median Sold Price of Existing Single-Family Homes				Sales		
State/Region/County	March 2026	Feb. 2026	March 2025		Price MTM% Chg	Price YTY% Chg	Sales MTM% Chg	Sales YTY% Chg
CA Single-family homes	\$889,190	\$830,370	\$885,900	r	7.1%	0.4%	-3.5%	-2.5%
CA Condo/Townhomes	\$664,320	\$645,000	\$681,260	r	3.0%	-2.5%	25.1%	4.8%
Los Angeles Metro Area	\$838,060	\$812,950	\$834,830		3.1%	0.4%	28.4%	2.2%
Central Coast	\$1,075,000	\$1,047,500	\$1,107,500		2.6%	-2.9%	29.8%	15.4%
Central Valley	\$493,600	\$485,000	\$495,000		1.8%	-0.3%	26.1%	1.3%
Far North	\$381,220	\$378,000	\$385,000		0.9%	-1.0%	49.2%	17.3%
Inland Empire	\$610,480	\$601,350	\$611,990	r	1.5%	-0.2%	31.1%	2.3%
San Francisco Bay Area	\$1,400,000	\$1,285,000	\$1,400,000		8.9%	0.0%	34.4%	3.2%
Southern California	\$880,000	\$861,880	\$877,750		2.1%	0.3%	26.6%	3.0%
San Francisco Bay Area								
Alameda	\$1,360,000	\$1,303,500	\$1,380,000		4.3%	-1.4%	32.0%	-7.7%
Contra Costa	\$870,000	\$819,000	\$907,000		6.2%	-4.1%	36.0%	0.2%
Marin	\$1,750,000	\$1,575,000	\$1,700,000		11.1%	2.9%	17.9%	-13.2%
Napa	\$858,679	\$837,000	\$1,004,660		2.6%	-14.5%	26.9%	11.9%
San Francisco	\$2,150,000	\$1,976,000	\$1,818,380		8.8%	18.2%	35.2%	2.6%
San Mateo	\$2,250,000	\$2,250,000	\$2,260,000		0.0%	-0.4%	43.0%	17.4%
Santa Clara	\$2,150,000	\$2,016,000	\$2,125,000		6.6%	1.2%	42.9%	5.1%
Solano	\$580,000	\$565,405	\$599,000		2.6%	-3.2%	30.1%	17.2%
Sonoma	\$862,500	\$809,500	\$857,500		6.5%	0.6%	22.5%	10.6%
Southern California								
Imperial	\$428,950	\$447,500	\$407,500		-4.1%	5.3%	11.6%	4.3%
Los Angeles	\$828,300	\$842,660	\$829,260		-1.7%	-0.1%	22.2%	2.2%

Orange	\$1,467,500	\$1,432,500	\$1,450,000	2.4%	1.2%	36.4%	1.3%
Riverside	\$643,740	\$631,000	\$638,810	2.0%	0.8%	30.4%	0.2%
San Bernardino	\$502,600	\$510,000	\$522,700	-1.5%	-3.8%	40.6%	7.0%
San Diego	\$1,050,500	\$1,050,000	\$1,040,000	0.0%	1.0%	20.3%	6.2%
Ventura	\$979,000	\$930,000	\$940,000	5.3%	4.1%	30.9%	4.0%
Central Coast							
Monterey	\$905,980	\$880,000	\$936,500	3.0%	-3.3%	30.4%	17.2%
San Luis Obispo	\$975,000	\$990,000	\$966,500	-1.5%	0.9%	33.1%	14.9%
Santa Barbara	\$1,397,500	\$1,215,000	\$1,409,200	15.0%	-0.8%	29.9%	14.5%
Santa Cruz	\$1,300,000	\$1,275,000	\$1,402,500	2.0%	-7.3%	23.3%	15.2%
Central Valley							
Fresno	\$434,400	\$426,250	\$435,000	1.9%	-0.1%	20.9%	8.2%
Glenn	\$345,000	\$370,000	\$325,000	-6.8%	6.2%	-35.7%	-30.8%
Kern	\$413,000	\$410,000	\$399,740	0.7%	3.3%	25.3%	-1.5%
Kings	\$399,000	\$356,990	\$360,000	11.8%	10.8%	28.3%	7.9%
Madera	\$435,000	\$435,000	\$446,340	0.0%	-2.5%	-5.2%	-30.3%
Merced	\$407,000	\$402,990	\$412,500	1.0%	-1.3%	18.1%	19.5%
Placer	\$675,750	\$639,980	\$665,000	5.6%	1.6%	36.0%	1.0%
Sacramento	\$550,000	\$545,000	\$560,000	0.9%	-1.8%	18.0%	7.0%
San Benito	\$775,000	\$821,000	\$769,000	-5.6%	0.8%	60.7%	28.6%
San Joaquin	\$559,950	\$525,000	\$550,000	6.7%	1.8%	41.9%	4.7%
Stanislaus	\$480,000	\$462,500	\$483,968	3.8%	-0.8%	41.2%	-4.7%
Tulare	\$400,000	\$381,000	\$388,120	5.0%	3.1%	33.5%	-15.2%
Far North							
Butte	\$429,990	\$435,750	\$444,000	-1.3%	-3.2%	61.7%	27.6%
Lassen	\$216,000	\$199,000	\$219,000	8.5%	-1.4%	66.7%	25.0%

Plumas	\$350,500	\$485,000	\$290,000	-27.7%	20.9%	30.0%	-23.5%
Shasta	\$407,250	\$386,500	\$375,000	5.4%	8.6%	38.0%	13.3%
Siskiyou	\$345,750	\$285,000	\$364,400	21.3%	-5.1%	26.3%	-7.7%
Tehama	\$312,450	\$323,628	\$355,000	-3.5%	-12.0%	110.0%	50.0%
Trinity	\$308,850	\$374,250	\$392,500	-17.5%	-21.3%	75.0%	75.0%
Other Calif. Counties							
Amador	\$465,000	\$445,000	\$440,000	4.5%	5.7%	24.2%	10.8%
Calaveras	\$469,000	\$452,920	\$430,000	3.6%	9.1%	46.7%	46.7%
Del Norte	\$422,500	\$335,000	\$185,000	26.1%	128.4%	20.0%	157.1%
El Dorado	\$659,000	\$700,000	\$722,500	-5.9%	-8.8%	37.7%	2.6%
Humboldt	\$403,500	\$430,000	\$390,000	-6.2%	3.5%	27.4%	5.3%
Lake	\$332,500	\$338,950	\$329,000	-1.9%	1.1%	5.0%	-14.3%
Mariposa	\$433,480	\$520,000	\$339,000	-16.6%	27.9%	-9.1%	-23.1%
Mendocino	\$557,500	\$481,500	\$555,880	15.8%	0.3%	0.0%	-15.8%
Mono	\$1,510,000	\$2,350,000	\$1,400,000	-35.7%	7.9%	233.3%	-23.1%
Nevada	\$540,000	\$532,000	\$561,000	1.5%	-3.7%	15.9%	5.3%
Sutter	\$430,000	\$464,040	\$424,000	-7.3%	1.4%	20.6%	32.3%
Tuolumne	\$379,850	\$362,500	\$403,000	4.8%	-5.7%	27.3%	-11.1%
Yolo	\$647,500	\$600,000	\$615,000	7.9%	5.3%	0.0%	1.0%
Yuba	\$457,500	\$430,000	\$448,800	6.4%	1.9%	28.3%	-1.4%

r = revised

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California's housing market remained sluggish in March as geopolitical tensions push mortgage rates higher, C.A.R. reports

- Existing, single-family home sales totaled 265,320 in March on a seasonally adjusted basis, down 3.5 percent from February and down 2.5 percent from 272,020 in March 2025.
- The statewide median home price soared 7.1 percent to \$889,190 in March and inched up 0.4 percent from \$885,900 in March 2025.
- Year-to-date statewide home sales fell 1.3 percent.

SACRAMENTO (April 21) – California's housing market retreated in March as the Iran conflict, surging energy prices and financial market volatility kept potential homebuyers and sellers in hibernation mode, the [CALIFORNIA ASSOCIATION OF REALTORS](#)[®] (C.A.R.) reported today.

Closed escrow sales of existing, single-family detached homes in California declined 3.5 percent in March, and fell 2.5 percent on a year-over-year basis for the third straight month. Total home sales declined to 265,320 in March, based on data collected by C.A.R. from more than 90 local REALTOR[®] associations and MLSs statewide. In March 2025, 272,020 existing homes traded based on a seasonally adjusted annualized rate.

March sales remained below the 300,000 benchmark for the 42nd consecutive month. A host of geopolitical concerns and economic fears – including the ongoing Middle East conflict and stock market volatility – likely prompted more buyers to cancel their contracts at the 11th hour.

“March home sales were subdued, as higher mortgage rates and stock market volatility kept many buyers on the sidelines,” said C.A.R. President Tamara Suminski. “As both geopolitical tension and interest rates ease for the third straight week, buyers and sellers who have been taking a wait-and-see strategy could return to the market if the conflict in the Middle East continues to stabilize.”

Following its traditional seasonal pattern, the statewide median home price rose solidly from February to March but only inched up slightly on a year-over-year basis. California's median price increased 7.1 percent from February and was in line with the average 7 percent increase in price movement observed between February and March in the past 20 years. March's price gain of 0.4 percent from a year ago was more moderate in comparison to the monthly increase but was the second straight month of positive price growth since the back-to-back dip in January.

As the market enters the spring homebuying season, prices are expected to climb, but lingering concerns about the Iran conflict and the risk of higher inflation may continue to constrain the pace of price growth in the months ahead.

“The number of homes listed on the market remains low compared to last year's levels even as the spring homebuying season kicks into its highest gear,” said C.A.R. Senior Vice President and Chief Economist

Jordan Levine. “Many homeowners locked in historically low mortgage rates are now reluctant to sell, limiting available inventory. While easing rates are bringing some buyers back to the market, California’s persistent housing shortage remains. This supply/demand imbalance will likely cap sales in the coming months, even as affordability improves modestly.”

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

- All five major regions in California recorded year-over-year sales increases on a non-seasonally adjusted basis last month, but the yearly gains were due primarily to an additional business transaction day in March this year compared to last year. The Far North (17.3 percent) and the Central Coast (15.4 percent) were the two regions in the Golden State that registered a double-digit gain from a year earlier. Home sales in the San Francisco Bay Area (3.2 percent), Southern California (3 percent) and the Central Valley (1.3 percent) also exceeded last year’s levels, but the increases were more moderate.
- At the county level, 38 of the 53 counties tracked by C.A.R. posted year-over-year sales gains in March, with 19 of them recording more than a 10 percent increase from a year ago. Del Norte (157.1 percent) posted the largest gain from a year earlier, followed by Trinity (75 percent) and Tehama (50 percent). At the other end of the spectrum, 15 counties experienced annual sales declines with 10 of them falling by double digits. Glenn led the pack with a -30.8 percent drop, while Madera (-30.3 percent) and Plumas (-23.5 percent) recorded the second and the third largest dips last month, respectively.
- At the regional level, home prices remained stable in most regions over the last year. The Central Coast had the largest median price change among all regions, with a decrease of 2.9 percent from a year ago. The other four major regions all had year-over-year changes of one percent or less, with the Far North (-1 percent) having the biggest change of the four, followed by the Central Valley (-0.3 percent), Southern California (0.3 percent), and the San Francisco Bay Area (0 percent).
- At the county level, 30 of the 53 counties tracked by C.A.R. recorded year-over-year median home price gains in March. Del Norte recorded the biggest jump in price with a 128.4 percent gain last month, followed by Mariposa (27.9 percent) and Plumas (20.9 percent). While more than half of the counties in California recorded price increases from a year ago, 23 counties experienced negative price growth at the end of the first quarter. Trinity recorded the steepest drop (-21.3 percent) in median price among all counties, while Napa (-14.5 percent) and Tehama (-12 percent) also fell by double digits. Sharp gains or losses in most of these counties were largely due to small number of transactions and mix of sales changes, rather than actual home value depreciations.
- Housing inventory tightened further in March as the market prepared for the seasonal peak. The statewide Unsold Inventory Index (UII) declined 17.5 percent from February and was down 5.7 percent from March 2025. While total active listings rose on a month-over-month basis, they fell below the year-ago level for the second consecutive month. This pullback in new listings is largely attributed to the “lock-in effect,” as homeowners with low-rate mortgages remain reluctant to list their properties in a higher-rate environment.

- Total active listings rose in 24 of the 53 counties that C.A.R. tracks. Mariposa saw the largest jump in listings at 48.7 percent, followed by Calaveras (31.9 percent) and Fresno (20.6 percent). Conversely, Lassen experienced the sharpest supply decline, dropping 51.8 percent from a year ago.
- The amount of time homes spent on the market inched up slightly year-over-year. The median number of days to sell a California single-family home totaled 23 in March, compared to 22 in March 2025.
- C.A.R.'s statewide sales-price-to-list-price ratio* equaled 100 percent last month, unchanged from the previous year.
- The median price per square foot** for an existing California single-family home fell from \$431 in March 2025 to \$428 this March.
- The average 30-year fixed rate mortgage was 6.18 percent in March down from 6.65 percent a year ago but up from 6.05 percent in February, 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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