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OCTOBER 2025

AUSTIN REAL ESTATE MARKET UPDATE

THE AUSTIN MSA EXISTING HOME MARKET STEADIES AS SALES POST LARGEST INCREASE OF 2025.

The Austin – Round Rock Housing Market:

New Home Sales – John Burns Real Estate Consulting (JBREC) reported that sales of new single-family housing (measured in a trailing 12 months) decreased 11.0% year-over-year to 15,481 closings in August 2025.

New Home Sales Price – The median sales price for new homes in August 2025 was $373,500, posting a 7.8% decrease.

Existing Single-Family Home Sales - The Austin Board of Realtors (ABoR) reports that existing single-family home sales increased 6.7% year-over-year to 2,416 home sales across the Austin MSA in September 2025.

Existing Single-Family Home Price - In September 2025, the median sales price for existing single family homes decreased 1.8% year-over-year to be $420,000.

Vaike O'Grady, research advisor at Unlock MLS, said that, "The numbers we're seeing in September match the trends we expected to see this time of year. As we wrap up the third quarter, the market is mirroring typical seasonality trends, pointing to a sign of continued adjustment and balance.

Buyer enthusiasm has picked up slightly as we saw the first interest rate cut in nine months, and steady pricing from sellers continues to support that confidence. What we're seeing in the market now is a healthy level of stability."

The Austin MSA ended September 2025 with 5.7 months of housing inventory, up by 0.6 months year-over-year.

The Austin Economy:

Due to the government shutdown, Texas Labor Market Information is not available at this time.

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SAN ANTONIO REAL ESTATE MARKET UPDATE

THE SAN ANTONIO MSA NEW AND EXISTING HOME MARKETS POST INCREASED SALES AS FALL ARRIVES.

The San Antonio Housing Market:

New Home Sales – John Burns Real Estate Consulting (JBREC) reported that sales of new single-family housing (measured in a trailing 12 months) saw an increase of 5.0% year-over-year to 18,885 sales in August 2025.

New Home Sales Price – The median sales price of new houses sold in August 2025 was $293,500, decreasing by 1.0% year-over-year.

Existing Single-Family Home Sales – The San Antonio Board of Realtors (SABoR) reports that existing single-family home sales in the San Antonio MSA totaled 2,823 homes in September 2025, increasing by 5.0%.

Existing Single-Family Home Price – The average price for existing single-family homes in the San Antonio MSA rose 1.0% to be $369,836 and the median price saw no change year-over-year to be $308,995 in September 2025.

"San Antonio's market continues to show strength in both new construction and resale activity," said Ed Zapata, SABOR's 2025 Chair of the Board.

The San Antonio Board of Realtors (SABoR) reports that months of inventory came in at 5.9 months. Even with rising inventory, Texas' growing population continues to drive the need for more housing.

The San Antonio Economy:

Due to the government shutdown, Texas Labor Market Information is not available at this time.

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DALLAS - FORT WORTH REAL ESTATE MARKET UPDATE

THE DFW HOUSING MARKET SEES AN UPTICK IN NEW HOME SALES AS EXISTING HOME PRICES COOL.

The DFW-Arlington Housing Market:

New Home Sales – John Burns Real Estate Consulting (JBREC) reported that sales of new single-family housing (measured in a trailing 12 months) saw an increase of 1.0% year-over-year, posting 43,645 sales in August 2025.

New Home Sales Price – The new home median sales price in August 2025 was $404,500, a decrease of 2.3% year-over-year.

Existing Single-Family Home Sales – The Texas A&M Texas Real Estate Research Center reports that existing single-family home sales volume increased 5.3% year-over-year from 7,278 to 7,666 transactions in September 2025. Dollar volume rose from $3.56 billion to $3.7 billion.

Existing Single-Family Home Price – The average price of an existing single-family home in the DFW MSA decreased 0.2% year-over-year from $488,260 to $487,419 in September 2025. The average price per square foot also declined from $208.80 to $203.80.

The median price for existing single-family homes decreased 0.02% year-over-year to be $389,715 in September 2025, while the median price per square foot also declined from $195.40 to $188.50.

Inventory of single-family homes rose year-over-year from 4.0 to 4.6 months of supply in September 2025, but it remains well below a balanced market's inventory of 6-6.5 months.

The DFW-Arlington Economy:

Due to the government shutdown, Texas Labor Market Information is not available at this time.

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	AUSTIN	SAN ANTONIO	DFW
NEW HOME TOTAL SALES (TTM: AUGUST 2025)	15,481 (11.0% < 2024)	18,885 (5.0% > 2024)	43,645 (1.0% > 2024)
NEW HOME MEDIAN SALES PRICE (TTM: AUGUST 2025)	$373,500 (7.8% < 2024)	$293,500 (1.0% < 2024)	$404,500 (2.3% < 2024)
EXISTING HOME TOTAL SALES (SEPTEMBER 2025)	2,416 (6.7% > 2024)	2,823 (5.0% > 2024)	7,666 (5.3% > 2024)
EXISTING HOME SINGLE-FAMILY MEDIAN SALES PRICE (SEPTEMBER 2025)	$420,000 (1.8% < 2024)	$308,995 (NO CHANGE)	$389,715 (0.02% < 2024)
EXISTING HOME SINGLE-FAMILY MONTHS INVENTORY (SEPTEMBER 2025)	5.7 MONTHS	5.9 MONTHS	4.6 MONTHS