

DECEMBER 2025

DALLAS - FORT WORTH REAL ESTATE MARKET UPDATE

THE DFW MSA HOUSING MARKET TRENDS TOWARD BALANCE AMID COOLING SALES AND PRICES.

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 no change year-over-year, posting 43,421 sales in October 2025.

New Home Sales Price - The new home median sales price in October 2025 was \$396,200, a decrease of 9.3% 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 decreased 8.0% year-over-year from 6,482 to 5,961 transactions in November 2025. Dollar volume dipped from \$3.3 billion to \$2.8 billion.

Existing Single-Family Home Price - The average price of an existing single-family home in the DFW MSA decreased 6.1% year-over-year from \$508,306 to \$477,166 in November 2025. The average price per square foot also declined from \$206.88 to \$197.92.

The median price for existing single-family homes declined 5.1% year-over-year from \$395,000 to \$375,000 in November 2025, and the median price per square foot also declined from \$191.88 to \$184.38.

Inventory of single-family homes rose year-over-year from 3.7 to 4.1 months of supply in November 2025, but it remains well below a balanced market's inventory of 6-6.5 months.

The DFW-Arlington Economy:

According to the latest figures published by the Texas Workforce Commission, the total number of non-farm jobs for the Dallas - Fort Worth - Arlington MSA was 4,298,900 in September 2025. This marks a 0.8% year-over-year increase.

The unemployment rate in the DFW MSA saw an increase of 0.3% to be 4.2% in September 2025.

The Private Education and Health Services sector led the way with a 3.2% increase year-over-year, and the Government sector saw the second highest year-over-year gain at 2.4% in September 2025.

	AUSTIN	SAN ANTONIO	DFW
NEW HOME TOTAL SALES (TTM: OCTOBER 2025)	15,515 (13.0% < 2024)	18,649 (1.0% > 2024)	43,421 (NO CHANGE)
NEW HOME MEDIAN SALES PRICE (TTM: OCTOBER 2025)	\$391,400 (7.8% < 2024)	\$316,900 (5.9% > 2024)	\$396,200 (9.3% < 2024)
EXISTING HOME TOTAL SALES (NOVEMBER 2025)	1,895 (15.9% < 2024)	2,206 (19.0% < 2024)	5,961 (8.0% > 2024)
EXISTING HOME SINGLE-FAMILY MEDIAN SALES PRICE (NOVEMBER 2025)	\$430,000 (1.1% < 2024)	\$315,000 (5.0% > 2024)	\$375,000 (5.1% < 2024)
EXISTING HOME SINGLE-FAMILY MONTHS INVENTORY (NOVEMBER 2025)	6.3 MONTHS	5.9 MONTHS	4.1 MONTHS