



## **DALLAS - FORT WORTH REAL ESTATE MARKET UPDATE**

### THE DFW MSA HOUSING MARKET TRENDS TOWARD BALANCE IN 2026 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 a decrease of 2.0% year-over-year, posting 42,858 sales in November 2025.

New Home Sales Price - The new home median sales price in November 2025 was \$396,300, a decrease of 8.1% 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 3.4% year-over-year from 7,047 to 7,286 transactions in December 2025. Dollar volume dipped from \$3.62 billion to \$3.61 billion.

Existing Single-Family Home Price - The average price of an existing single-family home in the DFW MSA decreased 3.7% year-over-year from \$514,154 to \$495,081 in December 2025. The average price per square foot also declined from \$207.35 to \$198.49.

The median price for existing single-family homes declined 5.5% year-over-year from \$400,000 to \$378,000 in December 2025, and the median price per square foot also declined from \$191.42 to \$183.98.

Inventory of single-family homes rose year-over-year from 3.2 to 3.4 months of supply in December 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 4,338,500 in December 2025. This marks a 0.3% year-over-year increase.

The unemployment rate in the DFW MSA saw an increase of 0.1% to be 3.6% in December 2025.

The Private Education and Health Services sector led the way with a 3.2% increase year-over-year, and the Other Services sector saw the second highest year-over-year gain at 2.3% in December 2025.

|   | AUSTIN                     | SAN ANTONIO                | DFW                        |
|---|----------------------------|----------------------------|----------------------------|
| NEW HOME TOTAL SALES<br>(TTM: NOVEMBER 2025)                      | 15,231<br>(14.0% < 2024)   | 18,393<br>(2.0% < 2024)    | 42,858<br>(2.0% < 2024)    |
| NEW HOME MEDIAN SALES PRICE<br>(TTM: NOVEMBER 2025)               | \$385,000<br>(4.7% < 2024) | \$305,900<br>(2.2% < 2024) | \$396,300<br>(8.1% < 2024) |
| EXISTING HOME TOTAL SALES<br>(DECEMBER 2025)                      | 2,514<br>(1.9% > 2024)     | 2,854<br>(8.0% > 2024)     | 7,286<br>(3.4% > 2024)     |
| EXISTING HOME SINGLE-FAMILY MEDIAN SALES PRICE<br>(DECEMBER 2025) | \$435,000<br>(3.3% < 2024) | \$309,990<br>(2.0% < 2024) | \$378,000<br>(5.5% < 2024) |
| EXISTING HOME SINGLE-FAMILY MONTHS INVENTORY<br>(DECEMBER 2025)   | 4.2<br>MONTHS              | 5.3<br>MONTHS              | 3.4<br>MONTHS              |