



**JANUARY 2026**

## **AUSTIN REAL ESTATE MARKET UPDATE**

THE AUSTIN HOUSING MARKET IS TRANSITIONING INTO A MORE BALANCED, BUYER-FRIENDLY ENVIRONMENT, CHARACTERIZED BY INCREASED INVENTORY AND MODERATED HOME PRICES.

### **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 14.0% year-over-year to 15,231 closings in November 2025.

New Home Sales Price - The median sales price for new homes in November 2025 was \$385,000, posting a 4.7% decrease.

Existing Single-Family Home Sales - [The Austin Board of Realtors \(ABoR\)](#) reports that existing single-family home sales increased 1.9% year-over-year to 2,514 home sales across the Austin MSA in December 2025.

Existing Single-Family Home Price - In December 2025, the median sales price for existing single family homes decreased 3.3% year-over-year to be \$435,000.

Vaike O’Grady, research advisor at Unlock MLS, points out that, “2025 wasn’t a year defined by urgency. It was defined by adjustment. Early in the year, we saw the effects of rate sensitivity, price hesitations and a flood of new listings that pushed inventory higher. As the year went on, sellers recalibrated, buyers reengaged and the pace of the market continued to normalize. December 2025 numbers confirmed that shift.”

The Austin MSA ended December 2025 with 4.2 months of housing inventory, up by 0.4 months year-over-year.

### **The Austin Economy:**

In December 2025, the unemployment rate in the Austin-Round Rock MSA was 3.2%, showing a slight increase year-over-year by 0.1%.

According to the [Texas Workforce Commission](#), Austin’s non-farm payroll job total as of December 2025 was 1,389,400, a 0.7% increase from December 2024.

In December 2025, the Government sector led the way with a 3.4% increase year-over-year, followed by the Private Education and Health Services sector with a 2.5% increase.



## **SAN ANTONIO REAL ESTATE MARKET UPDATE**

THE SAN ANTONIO MSA HOLDS STEADY HEADING INTO 2026 WITH EXISTING HOME SALES AND INVENTORY POSTING INCREASES.

### **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 a decrease of 2.0% year-over-year to 18,393 sales in November 2025.

New Home Sales Price - The median sales price of new houses sold in November 2025 was \$305,900, decreasing by 2.2% 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 2,854 homes in December 2025, increasing by 8.0%.

Existing Single-Family Home Price - The average price for existing single-family homes in the San Antonio MSA rose 2.0% to be \$375,539, and the median price decreased 2.0% year-over-year to be \$309,990 in December 2025.

“December’s data shows a market that continues to recalibrate rather than retreat,” said Ed Zapata, SABOR’s 2026 Chair of the Board. “Sales activity has picked up, inventory is giving buyers more flexibility, and prices remain stable.

### [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:**

The unemployment rate in the San Antonio MSA increased by 0.3% year-over-year to be 3.7% in December 2025.

According to the [Texas Workforce Commission \(TWC\)](#), San Antonio’s non-farm payroll jobs totaled 1,215,000 in December 2025.

The Texas Workforce Commission reported that the Private Education and Health Services sector led the way with a 5.3% increase year-over-year in December 2025, followed by the Trade, Transportation, and Utilities sectors with a 3.8% increase.



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