CRESCO INTELLIGENCE · CRESCO REAL ESTATE

California *Housing Market Report* Q3 2026

Prices, sales, days on market and inventory for the state, its five regions and 51 counties, from the California Association of REALTORS® monthly reports for July, August and September 2026.

Published 6 November 2026 · Data for July to September 2026

crescorealestate.us · 1-833-CRESCO-6

SUMMARY

Q3 2026 at a glance

$899,720
Statewide median, existing single family, September 2026
▲ 1.7%
year on year

260,410
Sales pace, seasonally adjusted annual rate, September
▼ 6.5%
year on year

3.7 mo
Unsold inventory index, September
3.6 months a year earlier

6.86%
30 year fixed mortgage rate, September average
6.35% a year earlier

Key findings

- **Prices held near $900,000.** The statewide median for existing single family sales was $887,680 in July, $901,420 in August and $899,720 in September. September was up 1.7% from $884,390 a year earlier. The simple average of the three monthly medians is $896,273.
- **Sales slowed at the end of the quarter.** The annualized sales pace rose to 269,620 in August, then fell to 260,410 in September, down 6.5% year on year. Year to date sales were still up 0.8%.
- **Borrowing costs rose through the quarter.** The 30 year fixed rate averaged 6.54% in July, 6.67% in August and 6.86% in September, against 6.35% in September 2025.
- **Supply stayed tight.** The unsold inventory index moved from 3.4 months in July to 3.7 months in September. Median days on market went from 26 to 29 days, still faster than 32 days a year earlier.
- **The Bay Area remains the most expensive region** at a September median of $1,325,000. The Central Coast posted the biggest regional price gain (up 4.4%) and was the only region where sales rose.
- **San Mateo had the highest median of the major counties** at $2,327,500. San Francisco rose 17.4% to $2,054,000, while Santa Clara slipped 4.0% to $1,920,000.
- **Southern California sales fell hardest.** Regional sales were down 9.1% in September. Los Angeles County sales were down 10.9%, San Diego down 12.2% and Riverside down 12.7%.
- **Million dollar sales:** 35.9% of September sales closed at $1 million or more. The condo and townhouse median was $640,000, down 1.5% year on year, with condo sales down 7.5%.

Contents

1. Statewide trends, July to September
2. Regions and metro areas
3. Major counties and their main cities
4. County profiles
5. Every reported county, September 2026
6. Method, sources and limits

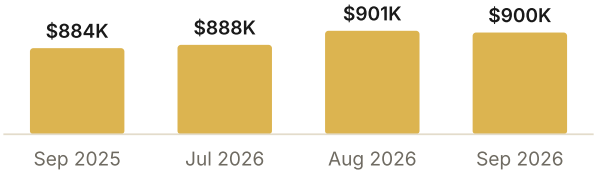
SECTION 1

Statewide trends, July to September 2026

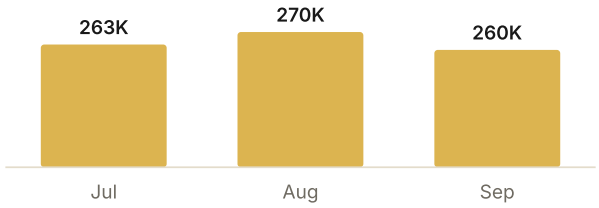
California’s median price for existing single family sales stayed in a narrow band around $900,000 all quarter, while the sales pace weakened in September as mortgage rates climbed.

MEASURE	JULY 2026	AUGUST 2026	SEPTEMBER 2026	SEPTEMBER 2025
Median price	$887,680	$901,420	$899,720	$884,390
Sales pace (SAAR)	263,170	269,620	260,410	
Condo and townhouse median	$645,000	$640,000	$640,000	
Median price per sq ft	$434	$428	$434	$427
Median days on market	26	28	29	32
Sale to list price ratio	99.3%	98.9%	98.8%	98.2%
Unsold inventory index (months)	3.4	3.7	3.7	3.6
30 year fixed rate (average)	6.54%	6.67%	6.86%	6.35%

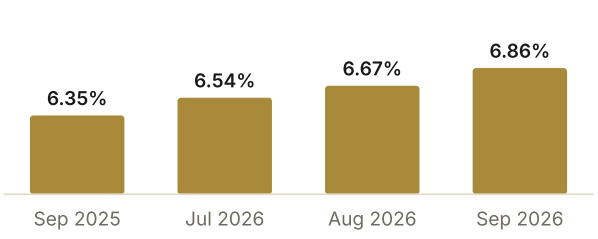
Statewide median price



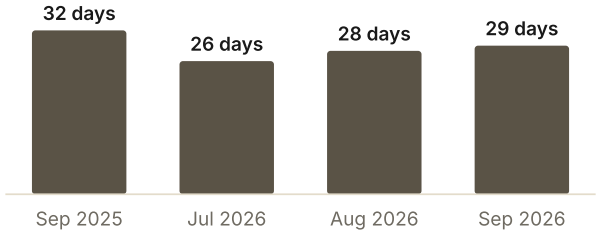
Sales pace, seasonally adjusted annual rate



30 year fixed mortgage rate, monthly average



Median days on market



Columns that do not start at zero are marked by their scale; read the labels, not the bar heights. Sales pace and medians: C.A.R. Mortgage rates: Freddie Mac averages as cited by C.A.R.

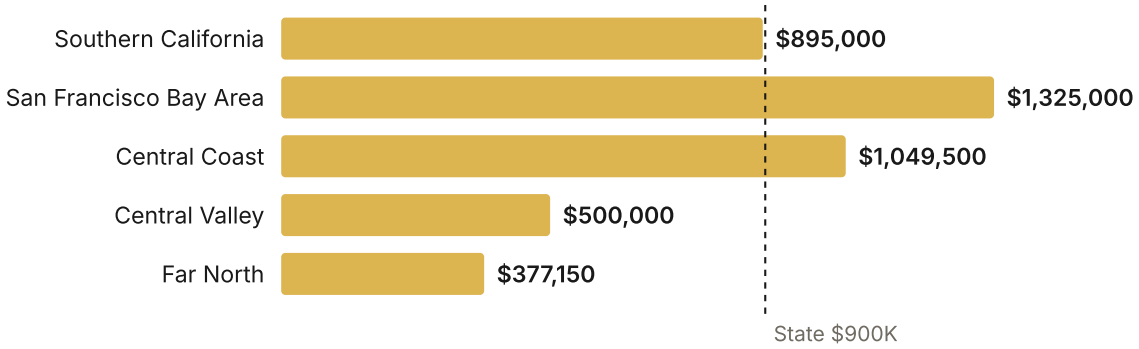
SECTION 2

Regions and metro areas

C.A.R. groups the state into five regions. The gap between them is wide: the Bay Area median is more than three times the Far North median.

REGION	SEPT 2026	AUG 2026	SEPT 2025	PRICE, YR ON YR	SALES, YR ON YR
Southern California	$895,000	$900,000	$869,250	▲ 3.0%	▼ 9.1%
San Francisco Bay Area	$1,325,000	$1,272,000	$1,300,000	▲ 1.9%	▼ 3.1%
Central Coast	$1,049,500	$1,075,000	$1,005,000	▲ 4.4%	▲ 4.4%
Central Valley	$500,000	$500,000	$499,900	0.0%	▼ 2.5%
Far North	$377,150	$389,000	$390,500	▼ 3.4%	▼ 9.0%

Median price by region, September 2026 (dashed line: statewide median)



Metro areas

METRO AREA	SEPT 2026 MEDIAN	PRICE, YR ON YR	SALES, YR ON YR
Los Angeles Metro Area	$855,000	▲ 3.0%	▼ 8.0%
Inland Empire	$601,030	▲ 1.7%	▼ 10.2%

The Los Angeles Metro Area as defined by C.A.R. differs from Los Angeles County, so the two medians are not the same figure.

SECTION 3

Major counties and their main cities

Fourteen counties cover the state's largest cities and most of its sales. Medians are for existing single family sales in each month. Southern California first.

COUNTY AND MAIN CITIES	REGION	JUL 2026	AUG 2026	SEP 2026	SEP 2025	PRICE YR ON YR	SALES YR ON YR
Los Angeles Los Angeles, Long Beach, Glendale, Santa Clarita	SoCal	$888,120	$946,950	$994,670	$983,230	▲ 1.2%	▼ 10.9%
Orange Anaheim, Santa Ana, Irvine, Huntington Beach	SoCal	$1,475,000	$1,452,500	$1,480,000	$1,401,250	▲ 5.6%	▼ 2.0%
San Diego San Diego, Chula Vista, Oceanside, Escondido	SoCal	$1,099,500	$1,090,000	$1,050,000	$990,000	▲ 6.1%	▼ 12.2%
Riverside Riverside, Moreno Valley, Corona, Temecula	SoCal	$649,000	$632,990	$620,000	$624,000	▼ 0.6%	▼ 12.7%
San Bernardino San Bernardino, Fontana, Ontario, Rancho Cucamonga	SoCal	$488,280	$522,370	$531,090	$500,030	▲ 6.2%	▼ 6.0%
Ventura Oxnard, Thousand Oaks, Simi Valley, Ventura	SoCal	$950,000	$925,000	$930,000	$900,000	▲ 3.3%	▲ 6.4%
San Francisco San Francisco	Bay Area	$2,050,000	$1,875,000	$2,054,000	$1,750,000	▲ 17.4%	▲ 6.2%

Year on year changes compare September 2026 with September 2025. County medians can move a lot from month to month; the three monthly figures show the range across the quarter.

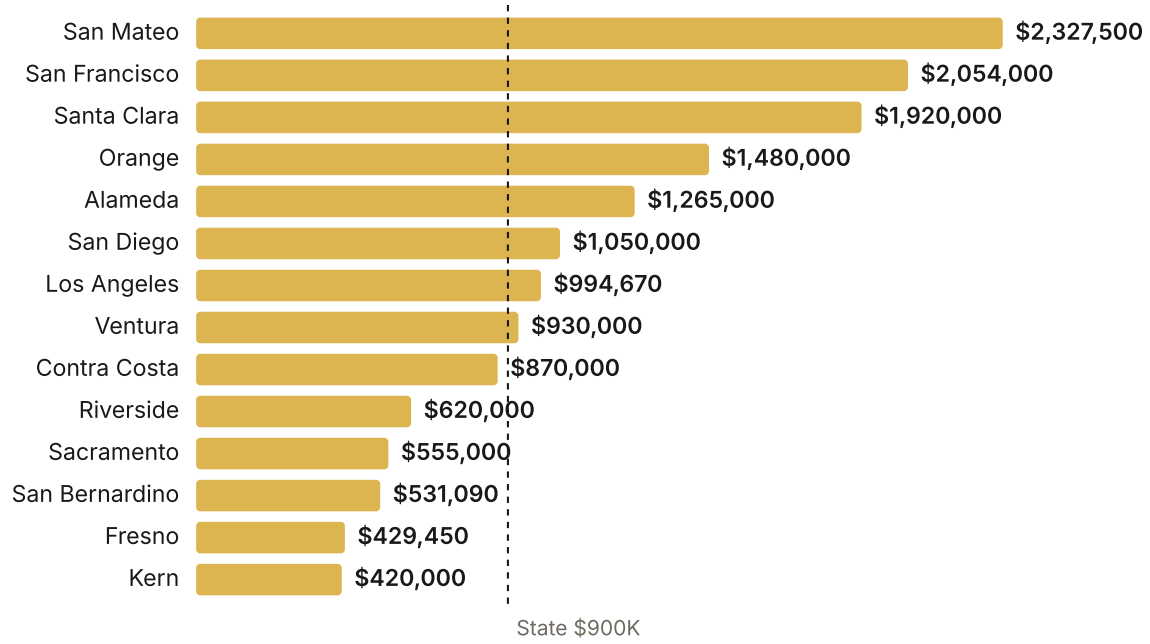
SECTION 3, CONTINUED

Bay Area and Central Valley counties

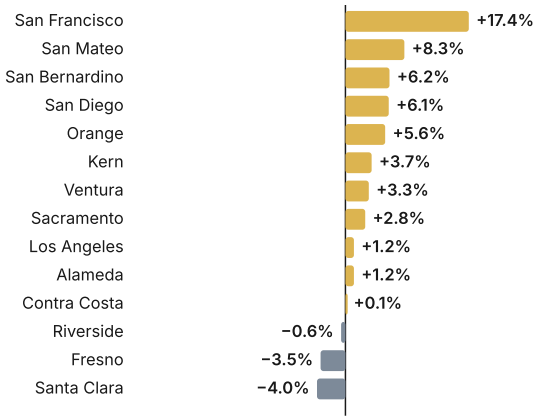
COUNTY AND MAIN CITIES	REGION	JUL 2026	AUG 2026	SEP 2026	SEP 2025	PRICE YR ON YR	SALES YR ON YR
San Mateo Daly City, San Mateo, Redwood City	Bay Area	$2,210,000	$2,250,000	$2,327,500	$2,150,000	▲ 8.3%	▼ 8.6%
Santa Clara San Jose, Sunnyvale, Santa Clara, Palo Alto	Bay Area	$1,955,000	$1,900,000	$1,920,000	$2,000,000	▼ 4.0%	▲ 1.5%
Alameda Oakland, Fremont, Hayward, Berkeley	Bay Area	$1,275,000	$1,285,000	$1,265,000	$1,250,000	▲ 1.2%	▼ 4.4%
Contra Costa Concord, Antioch, Richmond, Walnut Creek	Bay Area	$875,000	$875,000	$870,000	$869,000	▲ 0.1%	▼ 5.7%
Sacramento Sacramento, Elk Grove, Citrus Heights	Central Valley	$540,000	$549,000	$555,000	$539,860	▲ 2.8%	▼ 2.7%
Fresno Fresno, Clovis	Central Valley	$450,000	$430,000	$429,450	$445,000	▼ 3.5%	▼ 10.5%
Kern Bakersfield	Central Valley	$410,000	$400,500	$420,000	$405,000	▲ 3.7%	▼ 3.6%

How the major counties compare

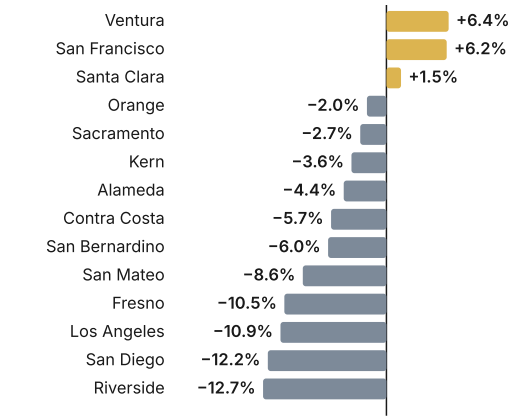
Median price, September 2026 (dashed line: statewide median)



Price change, Sept 2026 vs Sept 2025



Sales change, Sept 2026 vs Sept 2025



SECTION 4

County profiles

Los Angeles County

Los Angeles, Long Beach, Glendale, Santa Clarita

September median $994,670, up 1.2% year on year and close to the statewide median. Across the quarter the monthly median ranged from $888,120 to $994,670. September sales were down 10.9% on a year earlier.

Orange County

Anaheim, Santa Ana, Irvine, Huntington Beach

September median $1,480,000, up 5.6% year on year and 1.6 times the statewide median. Across the quarter the monthly median ranged from $1,452,500 to $1,480,000. September sales were down 2.0% on a year earlier.

San Diego County

San Diego, Chula Vista, Oceanside, Escondido

September median $1,050,000, up 6.1% year on year and 1.2 times the statewide median. Across the quarter the monthly median ranged from $1,050,000 to $1,099,500. September sales were down 12.2% on a year earlier.

Riverside County

Riverside, Moreno Valley, Corona, Temecula

September median $620,000, down 0.6% year on year and 31% below the statewide median. Across the quarter the monthly median ranged from $620,000 to $649,000. September sales were down 12.7% on a year earlier.

San Bernardino County

San Bernardino, Fontana, Ontario, Rancho Cucamonga

September median $531,090, up 6.2% year on year and 41% below the statewide median. Across the quarter the monthly median ranged from $488,280 to $531,090. September sales were down 6.0% on a year earlier.

Ventura County

Oxnard, Thousand Oaks, Simi Valley, Ventura

September median $930,000, up 3.3% year on year and close to the statewide median. Across the quarter the monthly median ranged from $925,000 to $950,000. September sales were up 6.4% on a year earlier.

San Francisco County

San Francisco

September median $2,054,000, up 17.4% year on year and 2.3 times the statewide median. Across the quarter the monthly median ranged from $1,875,000 to $2,054,000. September sales were up 6.2% on a year earlier.

San Mateo County

Daly City, San Mateo, Redwood City

September median $2,327,500, up 8.3% year on year and 2.6 times the statewide median. Across the quarter the monthly median ranged from $2,210,000 to $2,327,500. September sales were down 8.6% on a year earlier.

County profiles

Santa Clara County

San Jose, Sunnyvale, Santa Clara, Palo Alto

September median $1,920,000, down 4.0% year on year and 2.1 times the statewide median. Across the quarter the monthly median ranged from $1,900,000 to $1,955,000. September sales were up 1.5% on a year earlier.

Alameda County

Oakland, Fremont, Hayward, Berkeley

September median $1,265,000, up 1.2% year on year and 1.4 times the statewide median. Across the quarter the monthly median ranged from $1,265,000 to $1,285,000. September sales were down 4.4% on a year earlier.

Contra Costa County

Concord, Antioch, Richmond, Walnut Creek

September median $870,000, up 0.1% year on year and close to the statewide median. Across the quarter the monthly median ranged from $870,000 to $875,000. September sales were down 5.7% on a year earlier.

Sacramento County

Sacramento, Elk Grove, Citrus Heights

September median $555,000, up 2.8% year on year and 38% below the statewide median. Across the quarter the monthly median ranged from $540,000 to $555,000. September sales were down 2.7% on a year earlier.

Fresno County

Fresno, Clovis

September median $429,450, down 3.5% year on year and 52% below the statewide median. Across the quarter the monthly median ranged from $429,450 to $450,000. September sales were down 10.5% on a year earlier.

Kern County

Bakersfield

September median $420,000, up 3.7% year on year and 53% below the statewide median. Across the quarter the monthly median ranged from $400,500 to $420,000. September sales were down 3.6% on a year earlier.

SECTION 5

Every reported county, September 2026

Existing single family median prices for all counties in the C.A.R. September 2026 release that we could read in full.

COUNTY	SEPT 2026	SEPT 2025	PRICE YR ON YR	SALES YR ON YR
San Francisco Bay Area				
Alameda	$1,265,000	$1,250,000	▲ 1.2%	▼ 4.4%
Contra Costa	$870,000	$869,000	▲ 0.1%	▼ 5.7%
Marin	$1,678,750	$1,650,000	▲ 1.7%	▲ 11.1%
Napa	$918,000	$900,000	▲ 2.0%	▼ 16.0%
San Francisco	$2,054,000	$1,750,000	▲ 17.4%	▲ 6.2%
San Mateo	$2,327,500	$2,150,000	▲ 8.3%	▼ 8.6%
Santa Clara	$1,920,000	$2,000,000	▼ 4.0%	▲ 1.5%
Solano	$580,000	$608,000	▼ 4.6%	▼ 9.1%
Sonoma	$875,000	$795,000	▲ 10.1%	▼ 3.4%
Southern California				
Imperial	$435,000	$457,000	▼ 4.8%	▼ 33.3%
Los Angeles	$994,670	$983,230	▲ 1.2%	▼ 10.9%
Orange	$1,480,000	$1,401,250	▲ 5.6%	▼ 2.0%
Riverside	$620,000	$624,000	▼ 0.6%	▼ 12.7%
San Bernardino	$531,090	$500,030	▲ 6.2%	▼ 6.0%
San Diego	$1,050,000	$990,000	▲ 6.1%	▼ 12.2%
Ventura	$930,000	$900,000	▲ 3.3%	▲ 6.4%
Central Coast				
Monterey	$920,000	$950,000	▼ 3.2%	▲ 22.3%
San Luis Obispo	$950,000	$912,500	▲ 4.1%	▼ 3.0%

Every reported county, September 2026

COUNTY	SEPT 2026	SEPT 2025	PRICE YR ON YR	SALES YR ON YR
Central Coast				
Santa Barbara	$1,458,320	$1,100,000	▲ 32.6%	▲ 5.3%
Santa Cruz	$1,250,000	$1,234,800	▲ 1.2%	▼ 4.6%
Central Valley				
Fresno	$429,450	$445,000	▼ 3.5%	▼ 10.5%
Glenn	$415,000	$377,500	▲ 9.9%	▲ 8.3%
Kern	$420,000	$405,000	▲ 3.7%	▼ 3.6%
Kings	$381,300	$370,500	▲ 2.9%	▲ 13.5%
Madera	$445,000	$450,000	▼ 1.1%	▲ 11.0%
Merced	$430,000	$430,000	0.0%	▲ 11.3%
Placer	$675,000	$653,000	▲ 3.4%	▼ 5.6%
Sacramento	$555,000	$539,860	▲ 2.8%	▼ 2.7%
San Benito	$752,500	$750,000	▲ 0.3%	▼ 8.6%
San Joaquin	$549,000	$555,000	▼ 1.1%	▼ 4.3%
Stanislaus	$491,800	$475,000	▲ 3.5%	▲ 5.1%
Tulare	$380,000	$380,000	0.0%	▲ 2.6%
Far North				
Butte	$450,000	$462,000	▼ 2.6%	▼ 15.7%
Lassen	$237,500	$260,000	▼ 8.7%	▼ 30.0%
Plumas	$524,500	$455,000	▲ 15.3%	▼ 10.6%
Shasta	$385,000	$385,000	0.0%	▼ 2.5%

Every reported county, September 2026

COUNTY	SEPT 2026	SEPT 2025	PRICE YR ON YR	SALES YR ON YR
Far North				
Siskiyou	$315,000	$305,500	▲ 3.1%	▼ 33.3%
Tehama	$309,000	$311,500	▼ 0.8%	▲ 25.0%
Trinity	$250,000	$210,000	▲ 19.0%	▲ 60.0%
Other counties				
Del Norte	$416,500	$455,000	▼ 8.5%	▲ 5.9%
El Dorado	$681,500	$680,000	▲ 0.2%	▼ 10.9%
Humboldt	$440,000	$460,000	▼ 4.3%	▲ 5.7%
Lake	$390,000	$356,500	▲ 9.4%	▼ 3.6%
Mariposa	$364,500	$488,750	▼ 25.4%	▼ 8.3%
Mendocino	$480,000	$473,500	▲ 1.4%	0.0%
Mono	$1,547,500	$1,250,000	▲ 23.8%	▲ 14.3%
Nevada	$550,000	$532,500	▲ 3.3%	▼ 9.6%
Sutter	$432,500	$443,000	▼ 2.4%	▼ 10.4%
Tuolumne	$424,900	$424,500	▲ 0.1%	▲ 1.6%
Yolo	$634,500	$628,000	▲ 1.0%	▼ 22.0%
Yuba	$457,450	$435,000	▲ 5.2%	▼ 18.3%

Amador and Calaveras appear in the C.A.R. release but their rows could not be read in full, so they are left out rather than estimated. Small counties can swing sharply on a handful of sales.

METHOD, SOURCES AND LIMITS

How this report was built

- All prices are medians for existing single family sales unless a condo figure is named. A median is the middle sale: half sold for more, half for less. It moves with the mix of what sold, not only with values.
- Q3 2026 means July, August and September 2026. C.A.R. publishes monthly figures, so this report shows each month and compares September with September 2025. The quarterly average of monthly medians is a simple average for orientation only.
- Sales pace is the seasonally adjusted annualized rate published by C.A.R. for the state. County sales changes are year on year changes in September closings.
- Unsold inventory index: months needed to sell the current supply at the current sales pace. Sale to list price ratio: sale price as a share of the final list price.
- Main cities listed for each county are the largest cities in that county by population, for orientation. Figures are county wide, not city level.

Sources

1. **California Association of REALTORS, September 2026 sales and price report (released October 2026)**
   https://www.car.org/aboutus/mediacenter/newsreleases/2026releases/sept2026sales
2. **California Association of REALTORS, August 2026 sales and price report**
   https://www.car.org/aboutus/mediacenter/newsreleases/2026releases/august2026sales
3. **California Association of REALTORS, July 2026 sales and price report**
   https://www.car.org/aboutus/mediacenter/newsreleases/2026releases/July2026HomeSales

About this report. Cresco Intelligence is the research desk of Cresco Real Estate (licensed UAE brokerage, RERA ORN 34288; US office at 1800 N Vine Street, Suite 346, Los Angeles, CA 90028). This report compiles published third party data on the California housing market. It is general information, not investment, tax or legal advice, and it is not an appraisal of any property. Figures were checked against the cited sources on 6 November 2026. Sources may revise their numbers later.

© 2026 Cresco Real Estate LLC. You may quote this report with credit to "Cresco Intelligence, Q3 2026" and a link to crescorealestate.us.