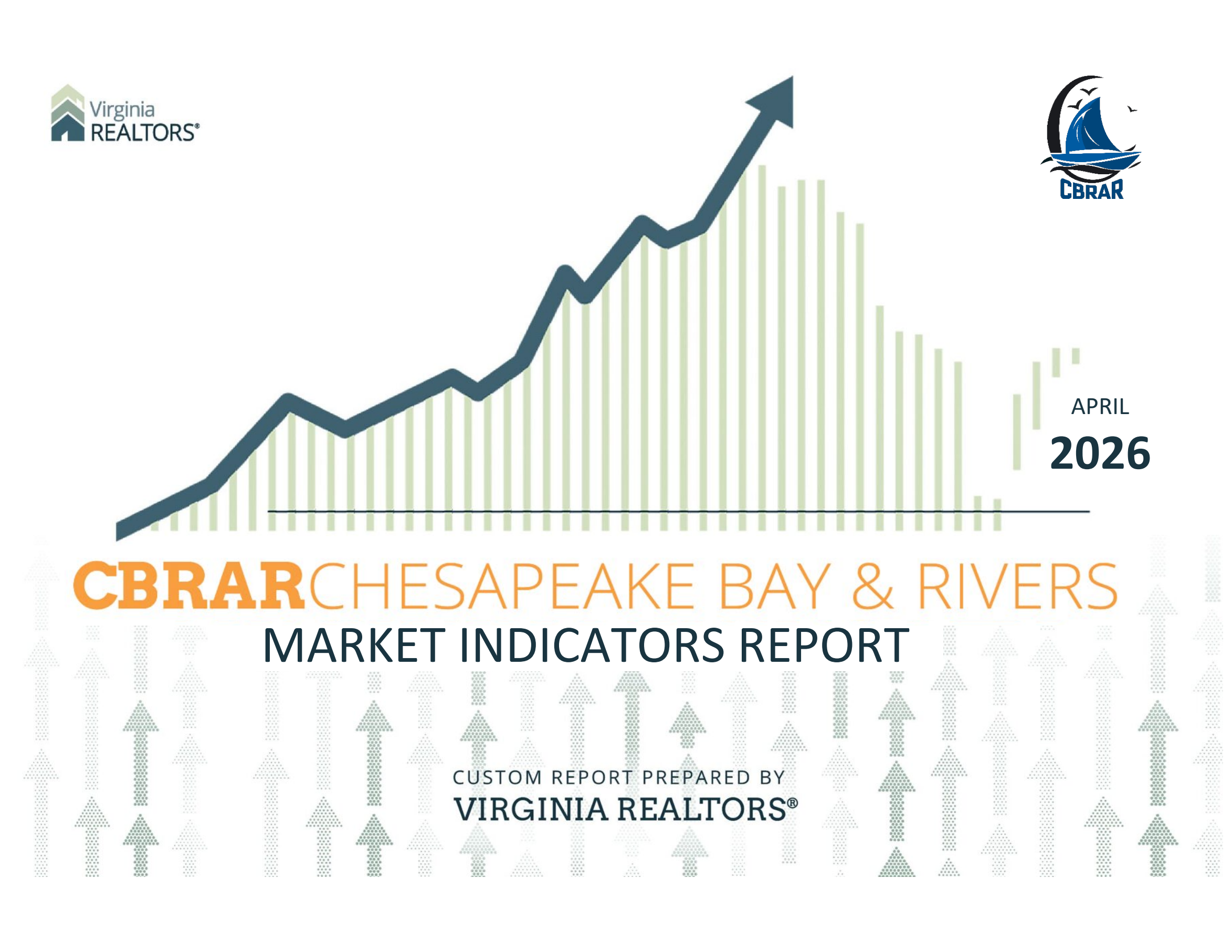


APRIL
2026



CBRAR CHESAPEAKE BAY & RIVERS MARKET INDICATORS REPORT

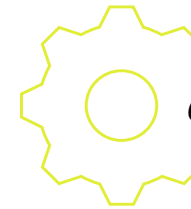
CUSTOM REPORT PREPARED BY
VIRGINIA REALTORS®

Chesapeake Bay & Rivers Market Indicators Report



Key Market Trends: April 2026

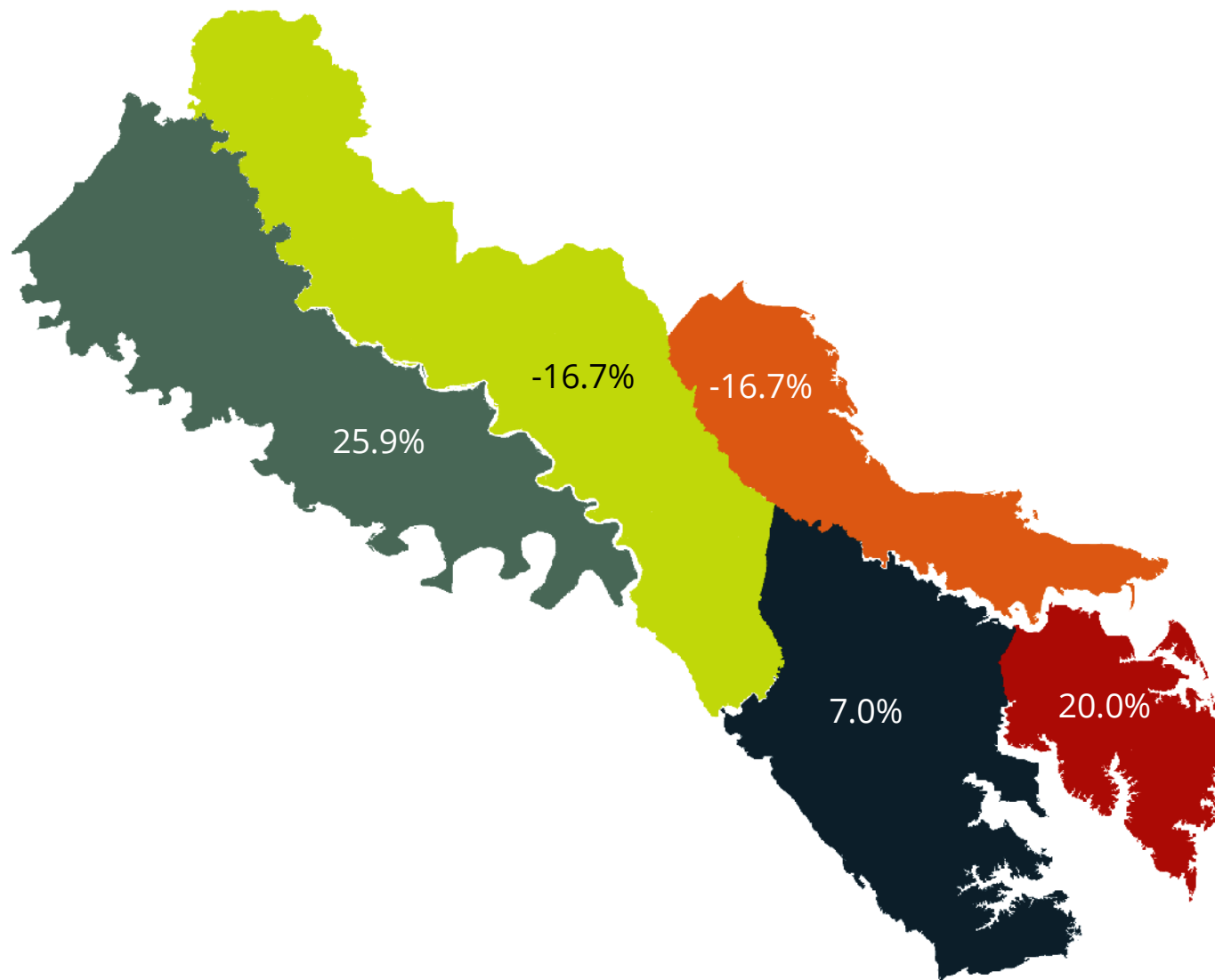
- > **Home sales grew in the Chesapeake Bay & Rivers market this month after falling last month.** There were 117 sales in the region, up 6.4% from the previous year, which is seven additional sales. In King William County, there were seven more sales compared to last April (+25.9%) while activity dipped in Middlesex County with four fewer home sales (-16.7%). Gloucester County experienced a small increase in sales with three more than a year ago (+7.0%).
- > **Pending sales continued to climb in the Chesapeake Bay & Rivers region.** Activity rose 9% leading to 121 pending sales in April, 10 more than a year earlier. Most of the growth this month was concentrated in Middlesex County with eight additional pending sales (+47.1%), King William County with seven more than last year (+20.6%) and Gloucester County with five additional pending sales (+16.1%). The biggest dip in pending sales occurred in King and Queen County (-46.2%).
- > **Prices continue to climb across the Chesapeake Bay & Rivers footprint.** At \$370,000, the median home price was \$20,000 higher compared to a year ago, increasing by 5.7%. There was a sharp price reduction in Mathews County with homes costing \$240,750, less than the year before (-48.2%). Homes in Middlesex County sold for \$61,500 less than the year prior (-16.6%). King and Queen County (+\$37,525) and King William County (+\$32,550) experienced significant price gains in the month of April.
- > **The Chesapeake Bay & Rivers area experienced a surge in listings at the end of April.** Listings jumped 26% resulting in 456 total listings on the market, 94 more than the previous year. All local markets experienced a rise in listing activity this month. Gloucester County had the largest influx of listings with 44 more than a year earlier (+31.2%). Mathews County (+18 listings) and Middlesex County (+16 listings) also saw an increase in listing activity.



Chesapeake Bay & Rivers Market Dashboard

YoY Chg	Apr-26	Indicator
▲ 6.4%	117	Sales
▲ 9.0%	121	Pending Sales
▲ 19.2%	211	New Listings
▲ 5.7%	\$370,000	Median List Price
▲ 5.7%	\$370,000	Median Sales Price
▲ 2.1%	\$219	Median Price Per Square Foot
▲ 6.0%	\$45.3	Sold Dollar Volume (in millions)
— 0.0%	100.0%	Median Sold/Ask Price Ratio
▲ 26.5%	60	Average Days on Market
▲ 26.0%	456	Active Listings
▲ 21.9%	4.5	Months of Supply

Market Activity - Chesapeake Bay & Rivers Footprint



<i>Jurisdiction</i>	Total Sales		
	Apr-25	Apr-26	% Chg
Gloucester County	43	46	7.0%
King & Queen County	6	5	-16.7%
King William County	27	34	25.9%
Mathews County	10	12	20.0%
Middlesex County	24	20	-16.7%
Chesapeake Bay & Rivers	110	117	6.4%

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Consumers Should Consult with a REALTOR®. Buying or selling real estate, for a majority of consumers, is one of the most important decisions they will make. Choosing a real estate professional continues to be a vital part of this process.

Identify a Professional to Manage the Procedure. REALTORS® are well-informed about critical factors that affect your specific market area – such as changes in market conditions, consumer attitudes and interest rates.

Are You Ready to Buy or Sell Real Estate?
Contact an experienced REALTOR®.



Total Market Overview



Key Metrics	2-year Trends			Apr-25	Apr-26	YoY Chg	2025 YTD	2026 YTD	YoY Chg
	Apr-24		Apr-26						
Sales				110	117	6.4%	364	344	-5.5%
Pending Sales				111	121	9.0%	405	395	-2.5%
New Listings				177	211	19.2%	614	675	9.9%
Median List Price				\$349,950	\$370,000	5.7%	\$350,000	\$375,000	7.1%
Median Sales Price				\$350,000	\$370,000	5.7%	\$350,000	\$377,000	7.7%
Median Price Per Square Foot				\$214	\$219	2.1%	\$214	\$215	0.2%
Sold Dollar Volume (in millions)				\$42.7	\$45.3	6.0%	\$142.3	\$141.6	-0.5%
Median Sold/Ask Price Ratio				100.0%	100.0%	0.0%	100.0%	100.0%	0.0%
Average Days on Market				48	60	26.5%	52	65	25.7%
Active Listings				362	456	26.0%	n/a	n/a	n/a
Months of Supply				3.7	4.5	21.9%	n/a	n/a	n/a

Source: Virginia REALTORS®, data accessed May 15, 2026

Single-Family Detached Market Overview



Key Metrics	2-year Trends			Apr-25	Apr-26	YoY Chg	2025 YTD	2026 YTD	YoY Chg
	Apr-24		Apr-26						
Sales				105	110	4.8%	347	324	-6.6%
Pending Sales				106	109	2.8%	388	363	-6.4%
New Listings				163	199	22.1%	578	623	7.8%
Median List Price				\$350,000	\$375,000	7.1%	\$350,000	\$379,950	8.6%
Median Sales Price				\$353,500	\$376,000	6.4%	\$350,000	\$380,000	8.6%
Median Price Per Square Foot				\$215	\$219	1.8%	\$215	\$218	1.4%
Sold Dollar Volume (in millions)				\$41.1	\$43.0	4.6%	\$136.6	\$135.1	-1.1%
Median Sold/Ask Price Ratio				100.0%	100.0%	0.0%	100.0%	100.0%	0.0%
Average Days on Market				48	58	20.8%	52	62	17.8%
Active Listings				332	413	24.4%	n/a	n/a	n/a
Months of Supply				3.6	3.9	8.8%	n/a	n/a	n/a

Source: Virginia REALTORS®, data accessed May 15, 2026

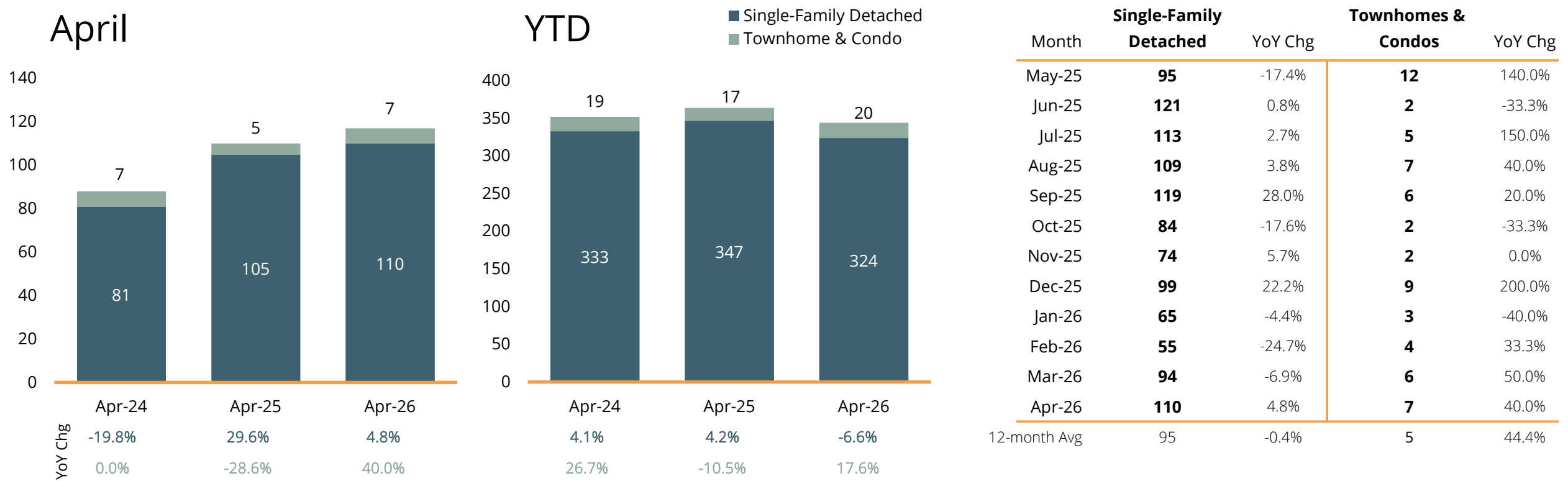
Townhome & Condo Market Overview



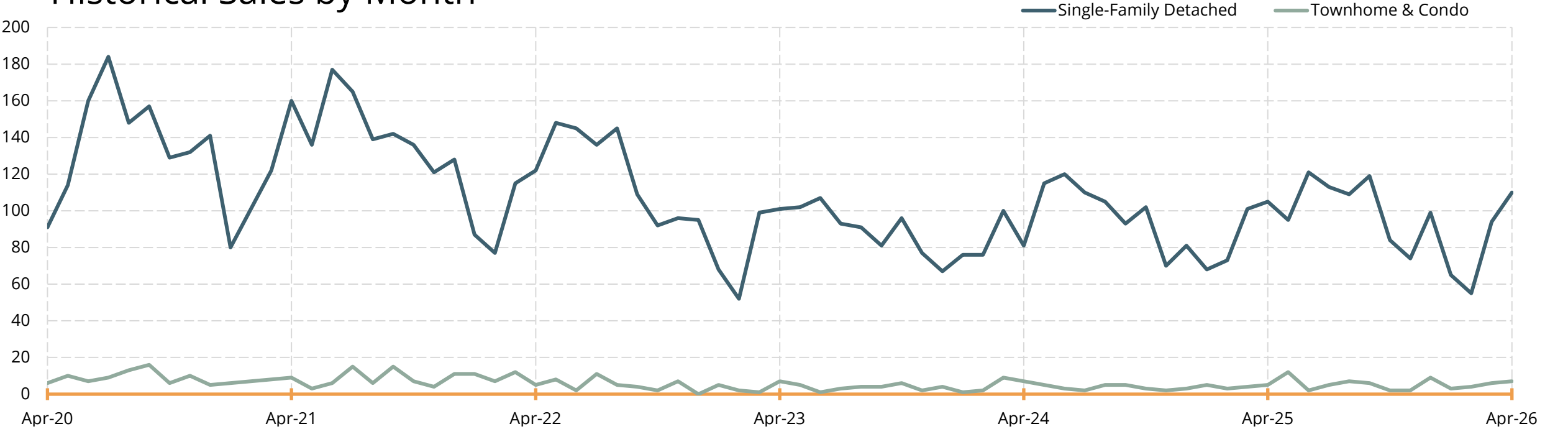
Key Metrics	Apr-24	2-year Trends	Apr-26	Apr-25	Apr-26	YoY Chg	2025 YTD	2026 YTD	YoY Chg
Sales				5	7	40.0%	17	20	17.6%
Pending Sales				5	12	140.0%	17	32	88.2%
New Listings				14	12	-14.3%	36	52	44.4%
Median List Price				\$319,950	\$299,000	-6.5%	\$357,400	\$305,176	-14.6%
Median Sales Price				\$319,950	\$299,000	-6.5%	\$356,400	\$303,500	-14.8%
Median Price Per Square Foot				\$206	\$195	-5.3%	\$211	\$203	-3.8%
Sold Dollar Volume (in millions)				\$1.6	\$2.3	40.0%	\$5.7	\$6.5	14.4%
Median Sold/Ask Price Ratio				100.0%	100.0%	0.0%	100.0%	100.0%	0.0%
Average Days on Market				47	102	118.9%	43	119	177.4%
Active Listings				30	43	43.3%	n/a	n/a	n/a
Months of Supply				5.4	7.5	38.7%	n/a	n/a	n/a

Source: Virginia REALTORS®, data accessed May 15, 2026

Sales

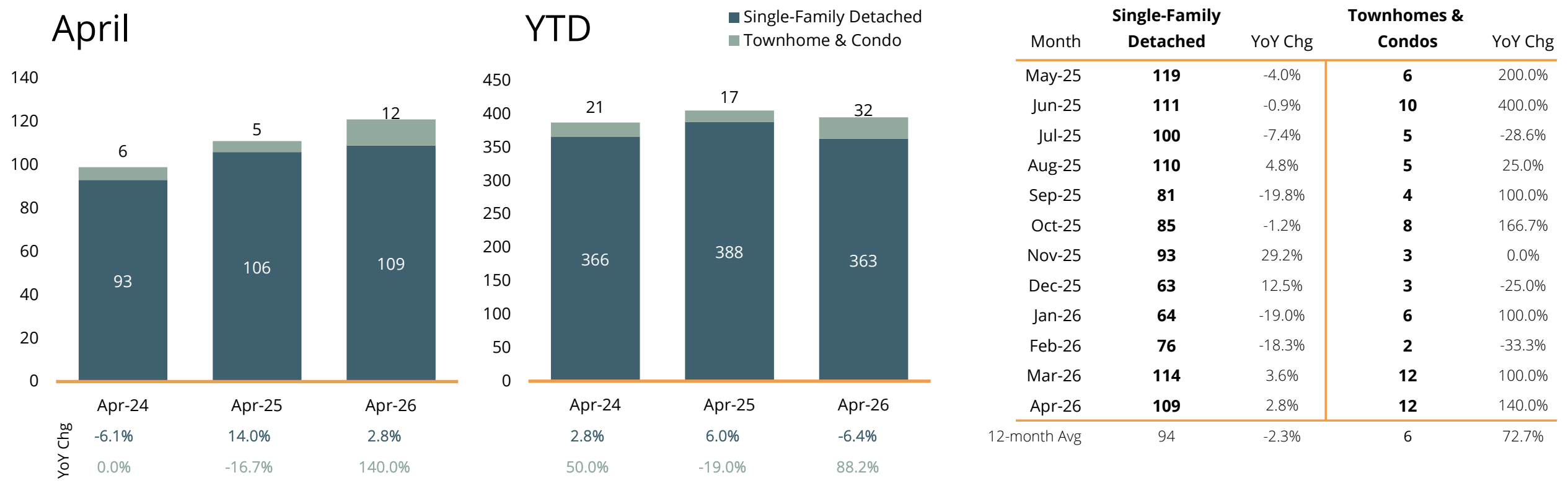


Historical Sales by Month

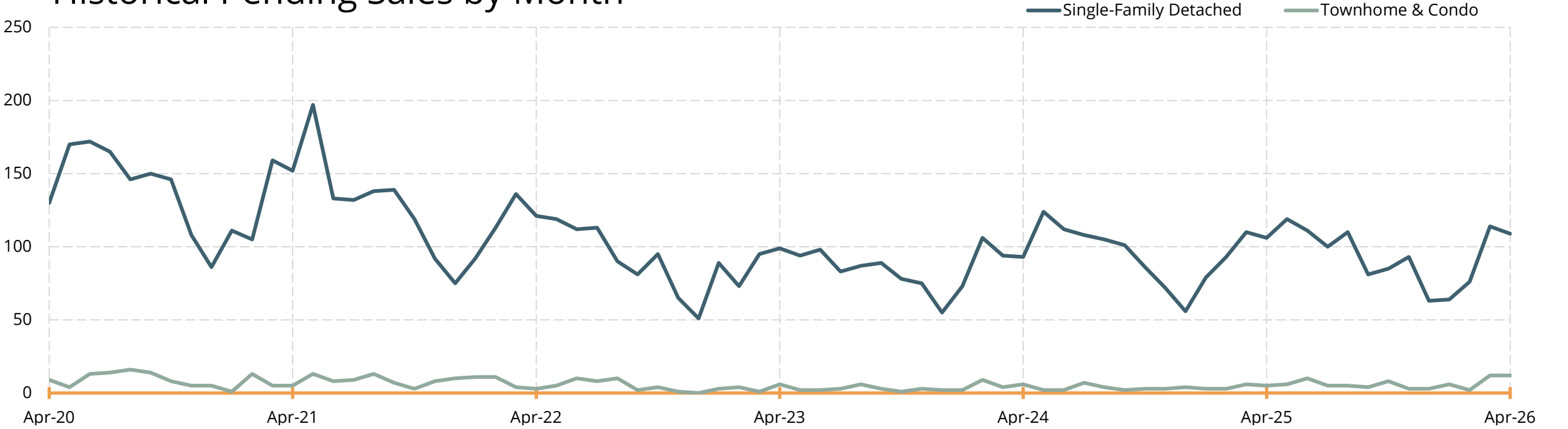


Source: Virginia REALTORS®, data accessed May 15, 2026

Pending Sales

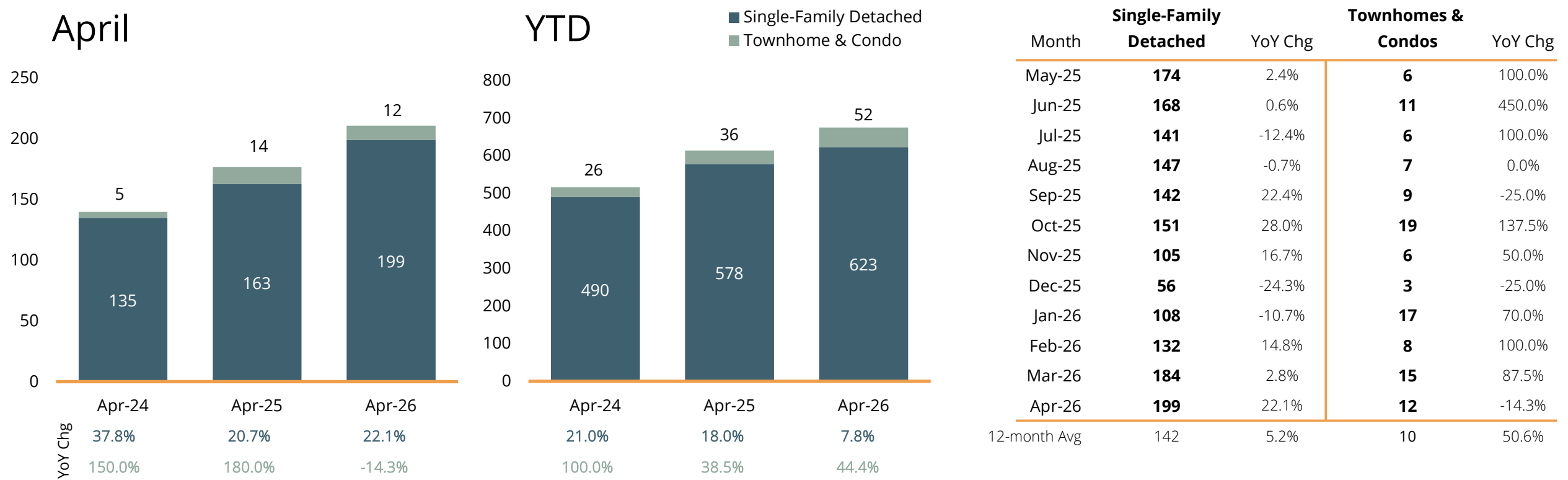


Historical Pending Sales by Month

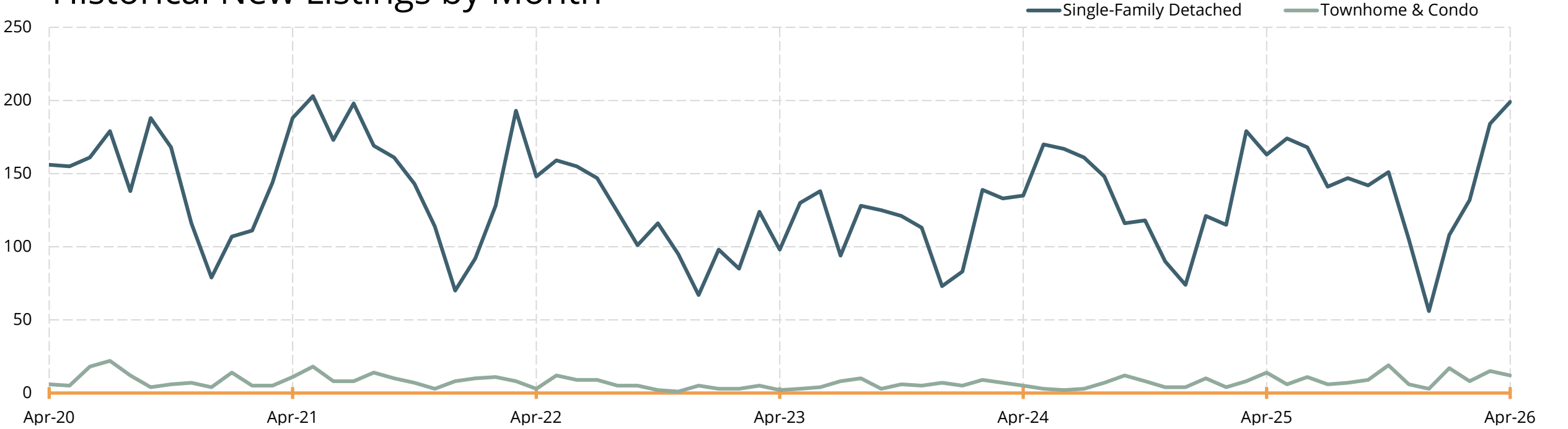


Source: Virginia REALTORS®, data accessed May 15, 2026

New Listings

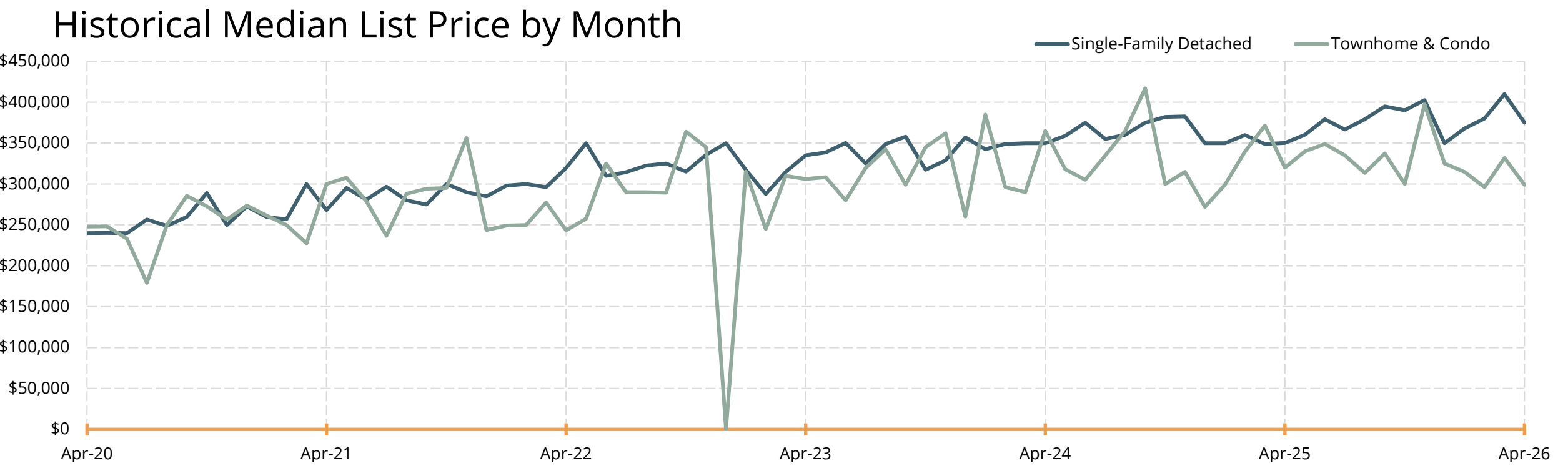
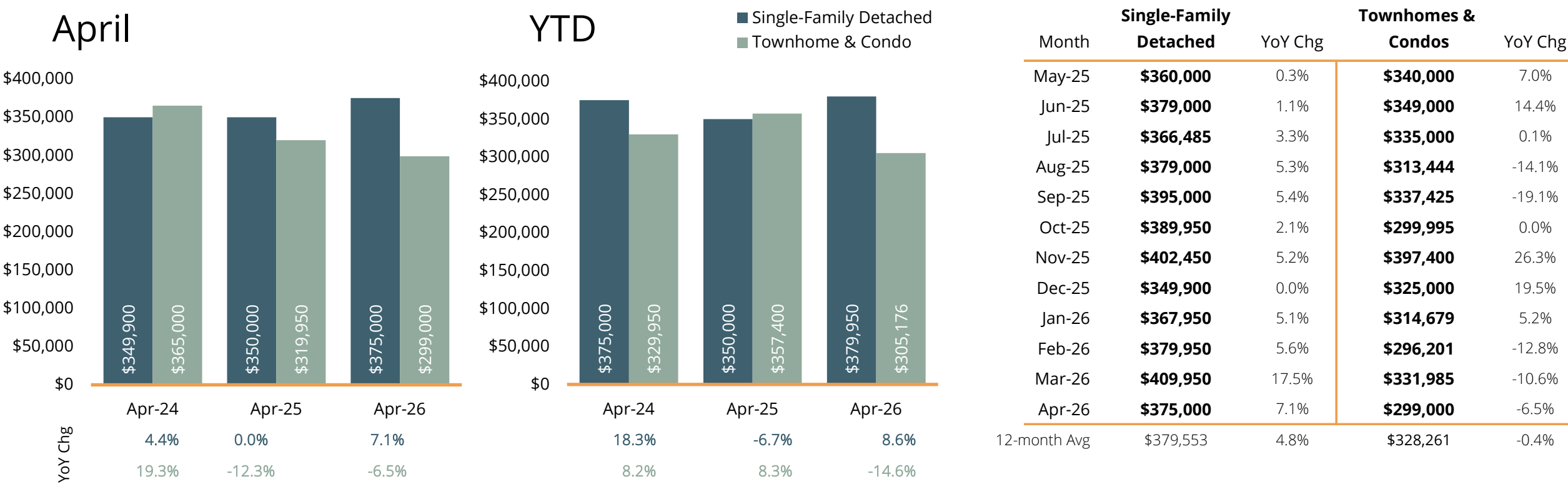


Historical New Listings by Month



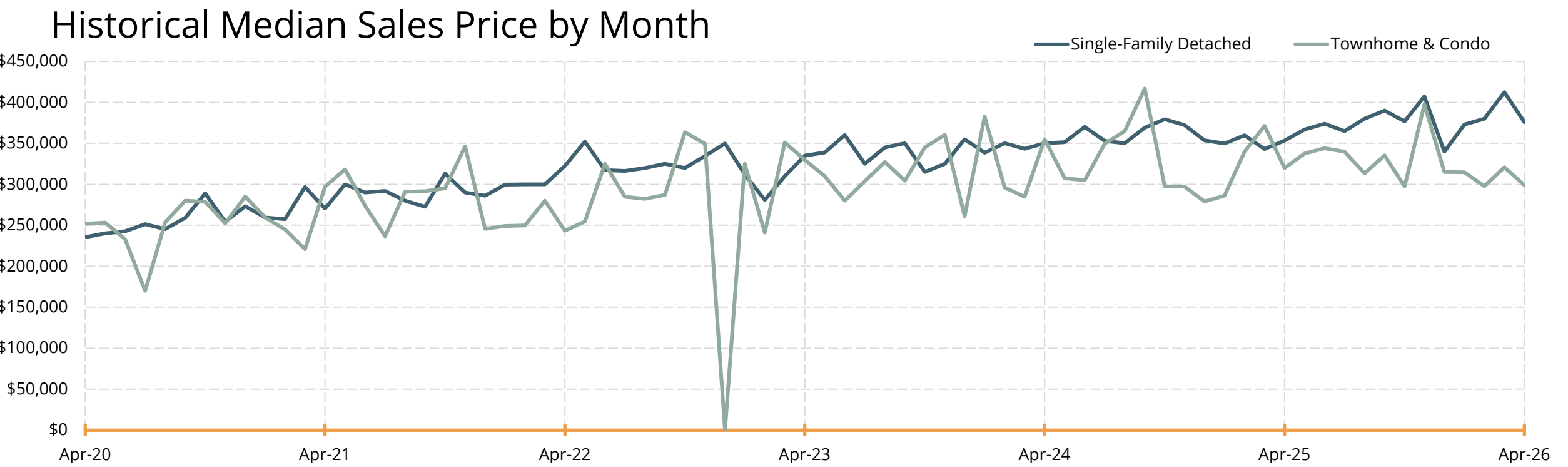
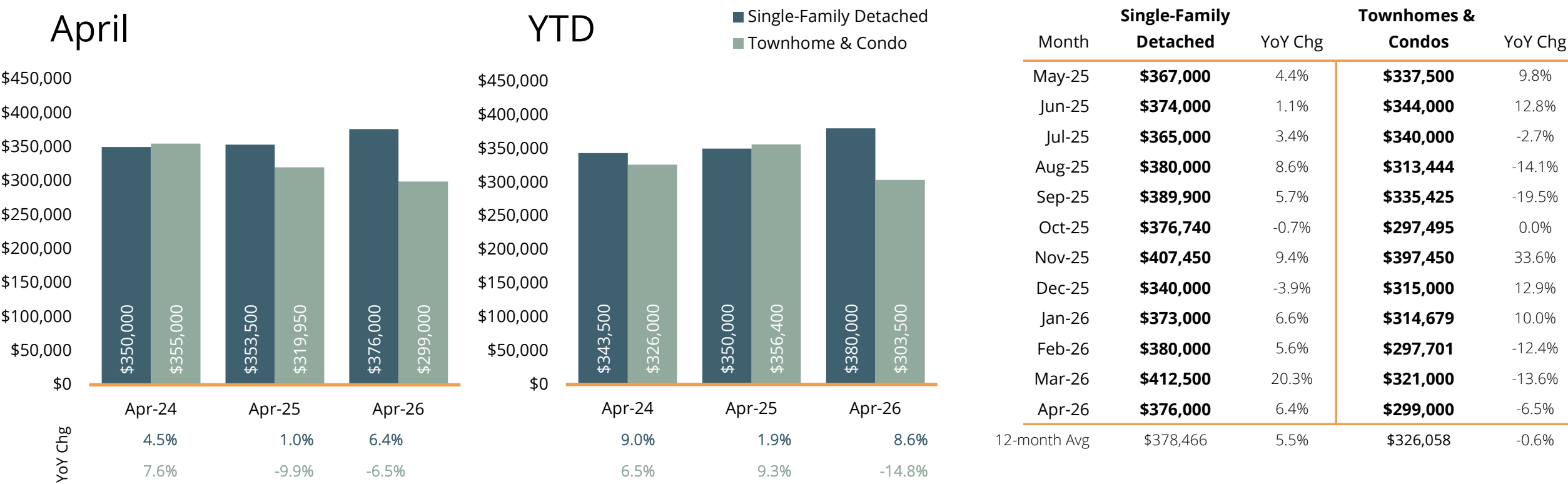
Source: Virginia REALTORS®, data accessed May 15, 2026

Median List Price



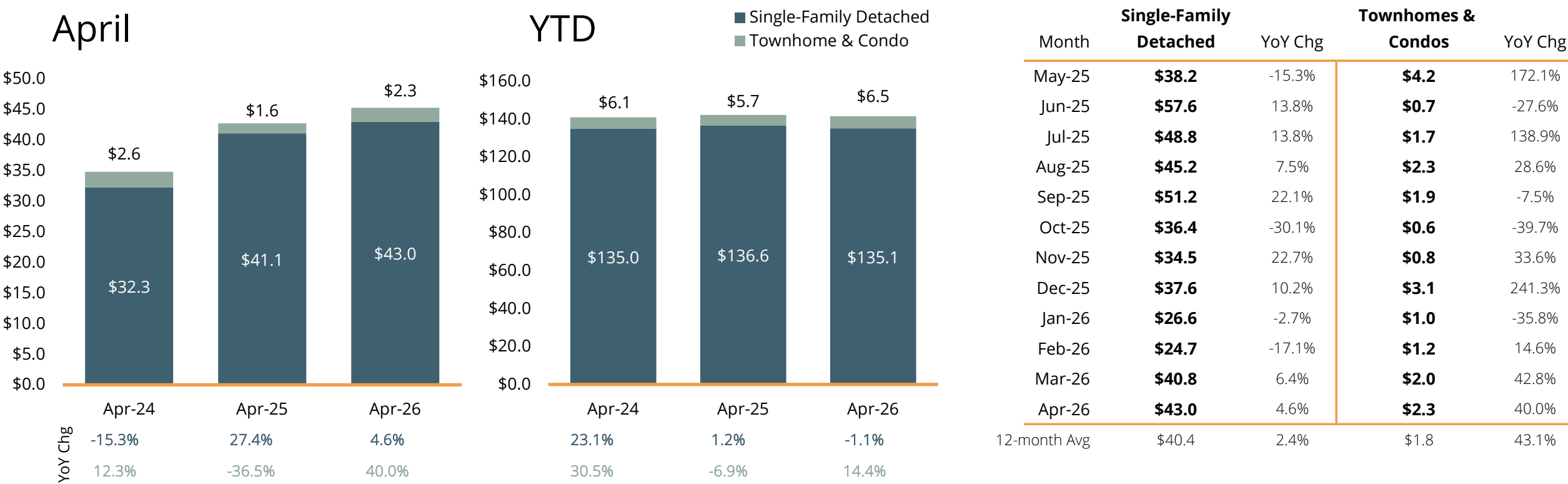
Source: Virginia REALTORS®, data accessed May 15, 2026

Median Sales Price

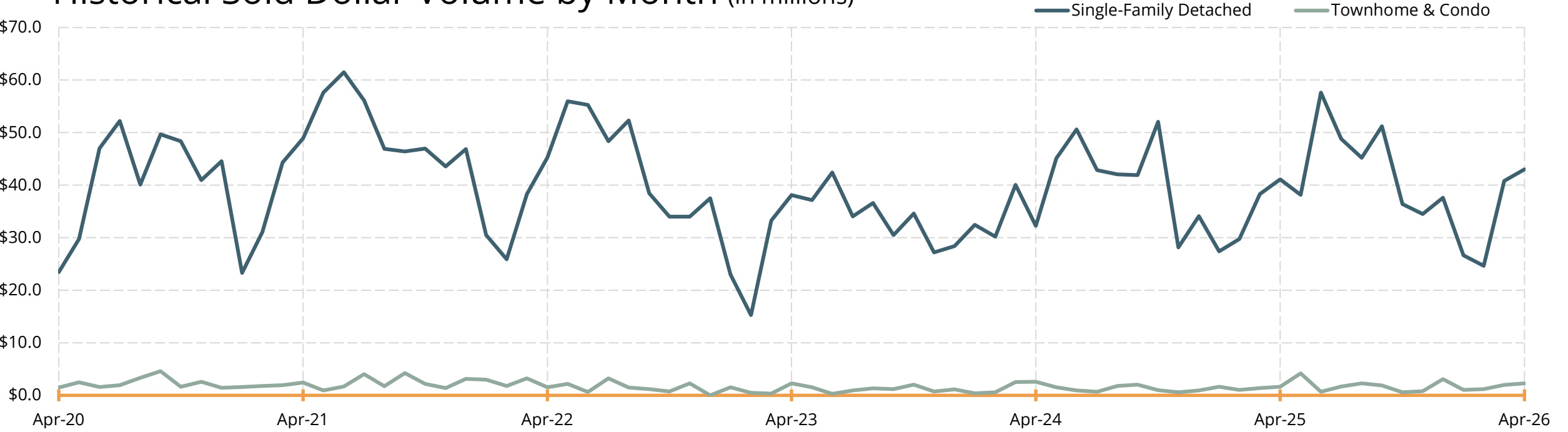


Source: Virginia REALTORS®, data accessed May 15, 2026

Sold Dollar Volume (in millions)

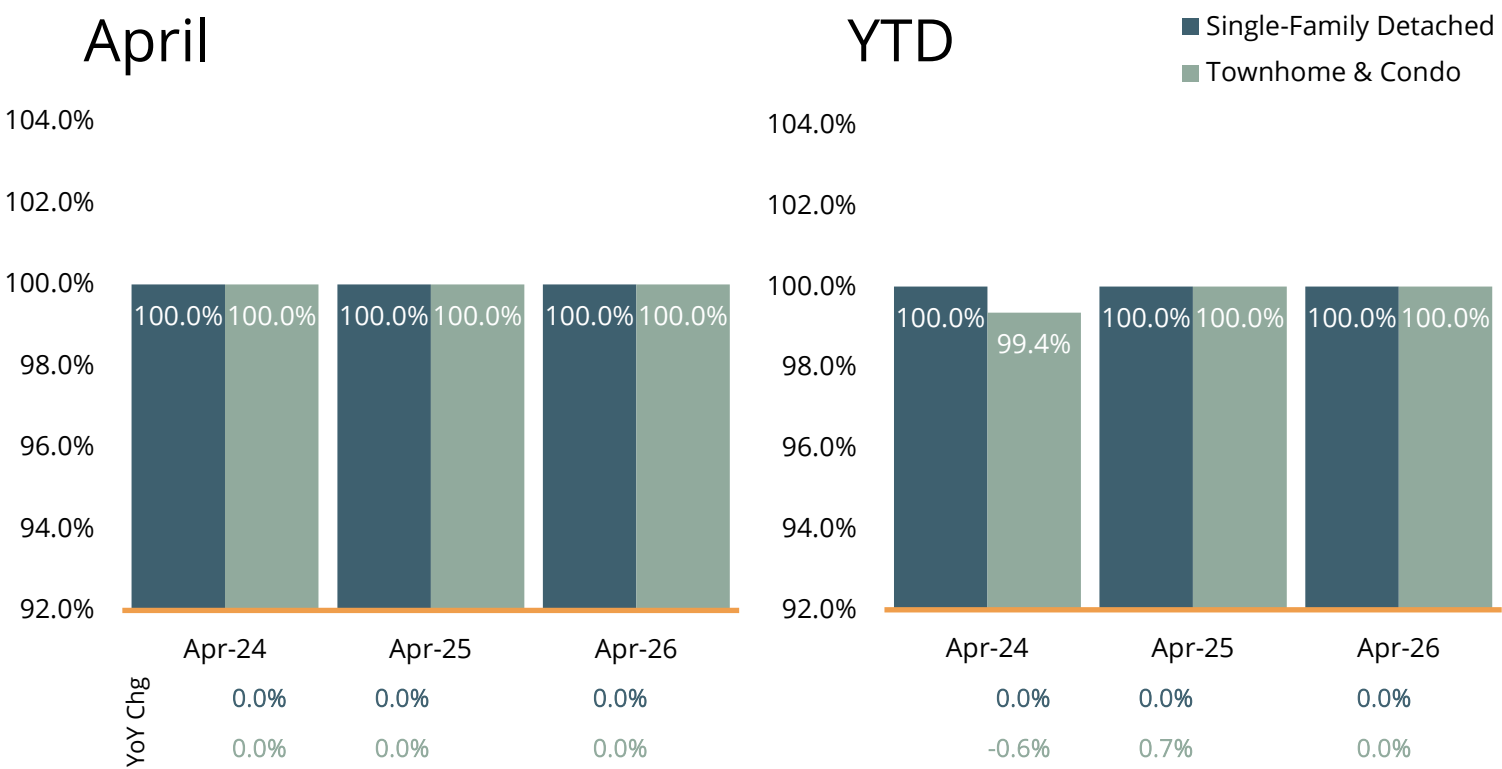


Historical Sold Dollar Volume by Month (in millions)



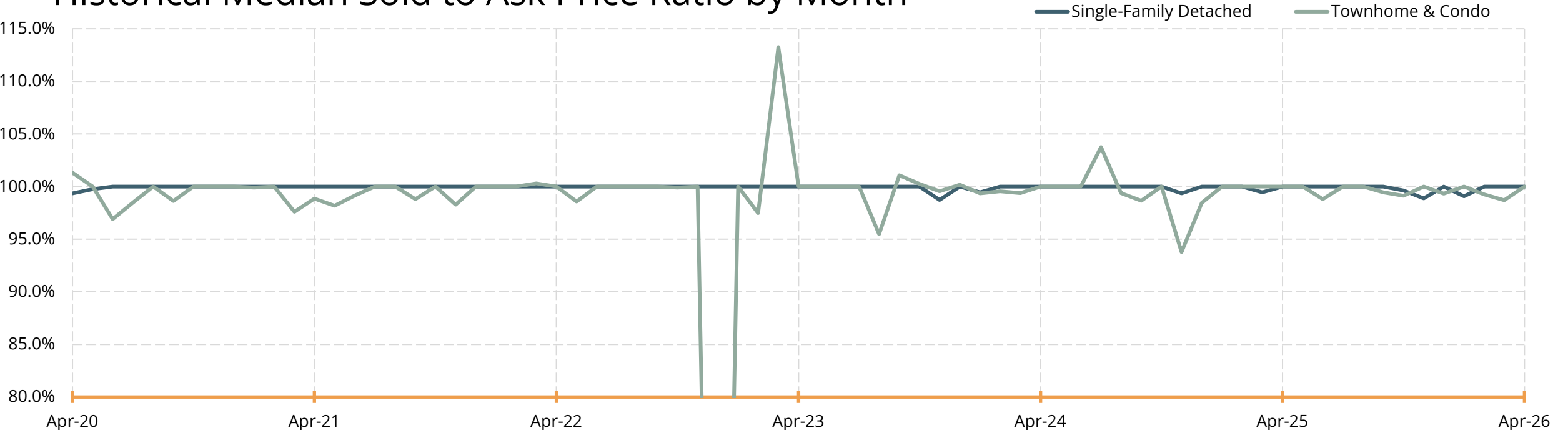
Source: Virginia REALTORS®, data accessed May 15, 2026

Median Sold to Ask Price Ratio



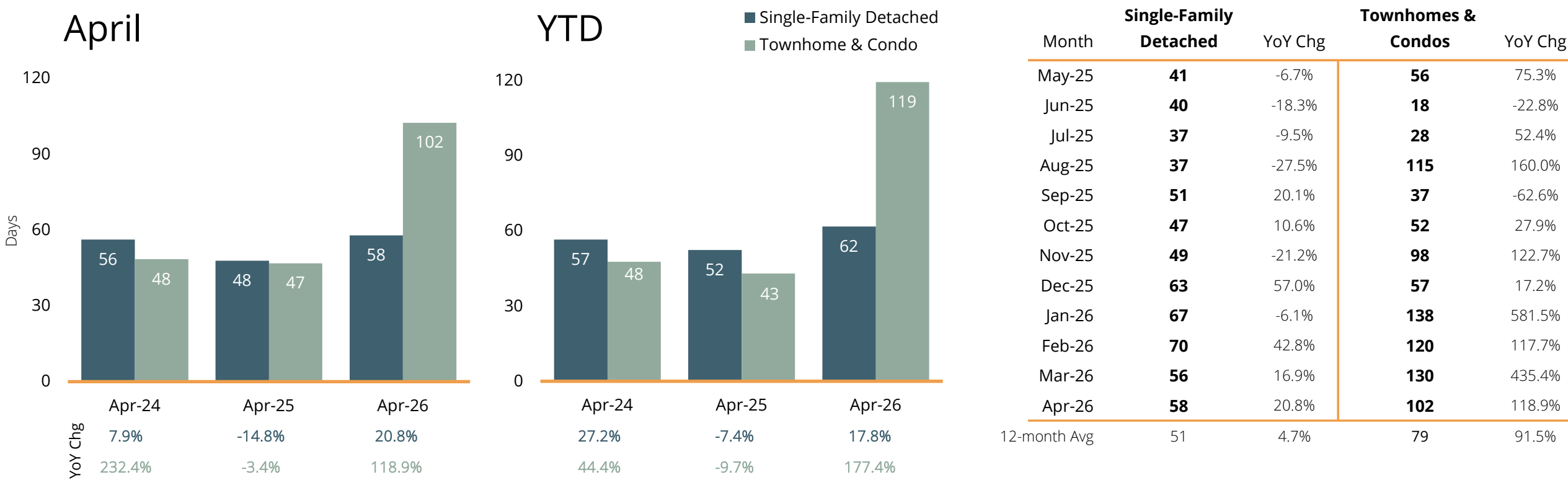
Month	Single-Family		Townhomes &	
	Detached	YoY Chg	Condos	YoY Chg
May-25	100.0%	0.0%	100.0%	0.0%
Jun-25	100.0%	0.0%	98.8%	-1.2%
Jul-25	100.0%	0.0%	100.0%	-3.6%
Aug-25	100.0%	0.0%	100.0%	0.6%
Sep-25	100.0%	0.0%	99.5%	0.8%
Oct-25	99.6%	-0.4%	99.1%	-0.9%
Nov-25	98.9%	-0.5%	100.0%	6.7%
Dec-25	100.0%	0.0%	99.3%	0.9%
Jan-26	99.1%	-0.9%	100.0%	0.0%
Feb-26	100.0%	0.0%	99.3%	-0.7%
Mar-26	100.0%	0.6%	98.7%	-1.3%
Apr-26	100.0%	0.0%	100.0%	0.0%
12-month Avg	99.8%	-0.1%	99.6%	0.1%

Historical Median Sold to Ask Price Ratio by Month

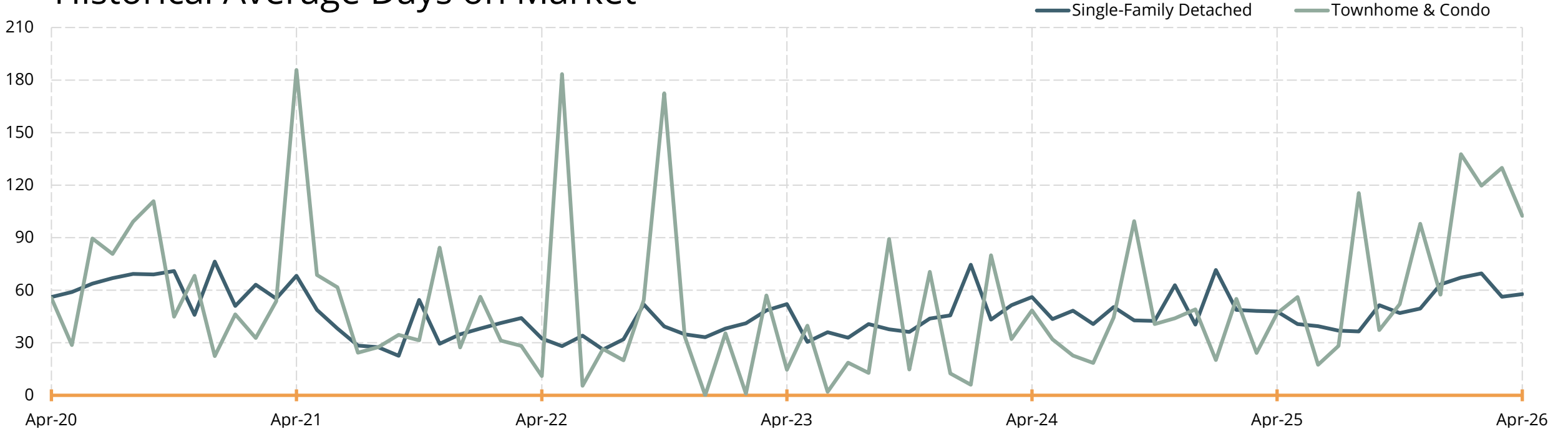


Source: Virginia REALTORS®, data accessed May 15, 2026

Average Days on Market



Historical Average Days on Market

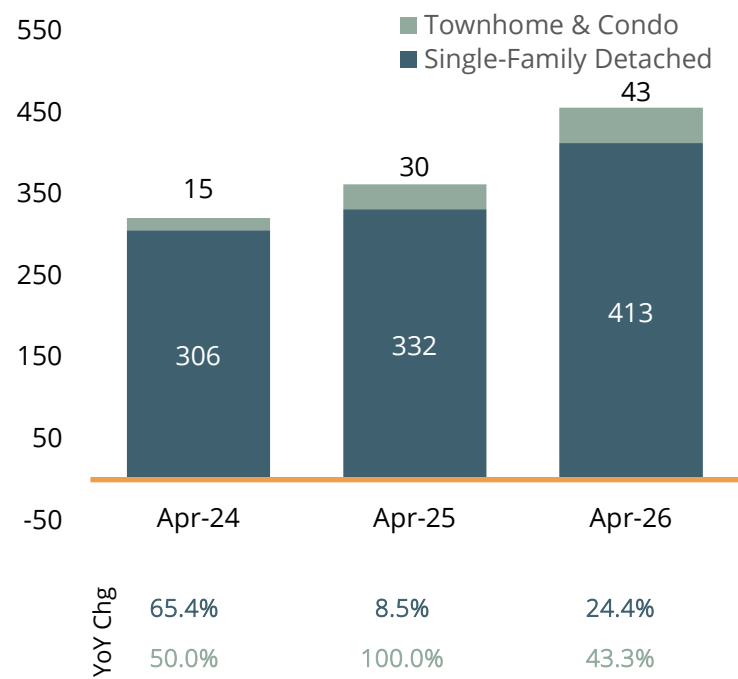


Source: Virginia REALTORS®, data accessed May 15, 2026

Active Listings

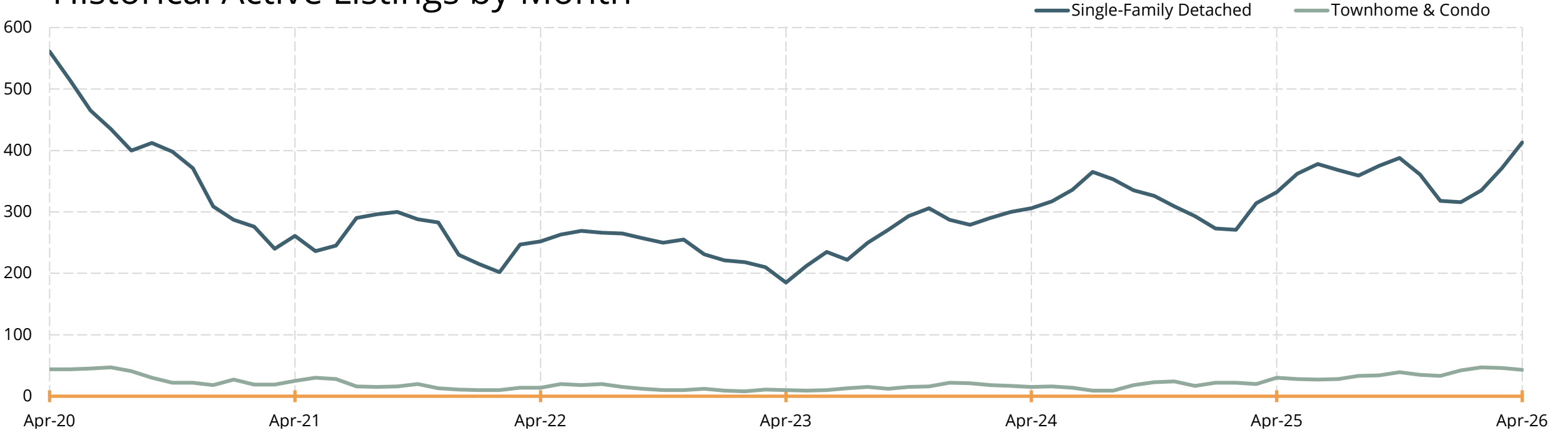


April



Month	Single-Family		Townhomes &	
	Detached	YoY Chg	Condos	YoY Chg
May-25	362	14.2%	28	75.0%
Jun-25	378	12.5%	27	92.9%
Jul-25	368	0.8%	28	211.1%
Aug-25	359	1.7%	33	266.7%
Sep-25	375	11.9%	34	88.9%
Oct-25	388	19.0%	39	69.6%
Nov-25	361	16.8%	35	45.8%
Dec-25	318	8.5%	33	94.1%
Jan-26	316	15.8%	42	90.9%
Feb-26	335	23.6%	47	113.6%
Mar-26	371	18.2%	46	130.0%
Apr-26	413	24.4%	43	43.3%
12-month Avg	362	13.6%	36	94.2%

Historical Active Listings by Month

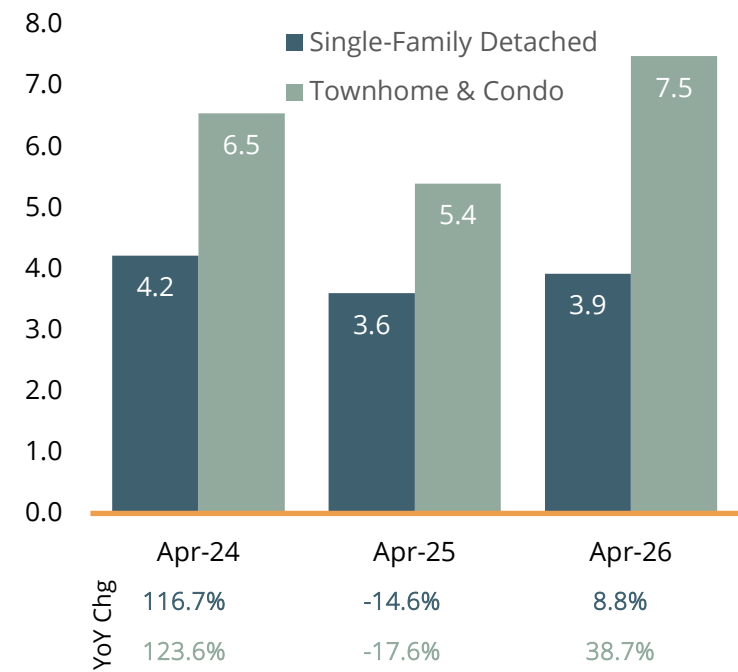


Source: Virginia REALTORS®, data accessed May 15, 2026

Months of Supply

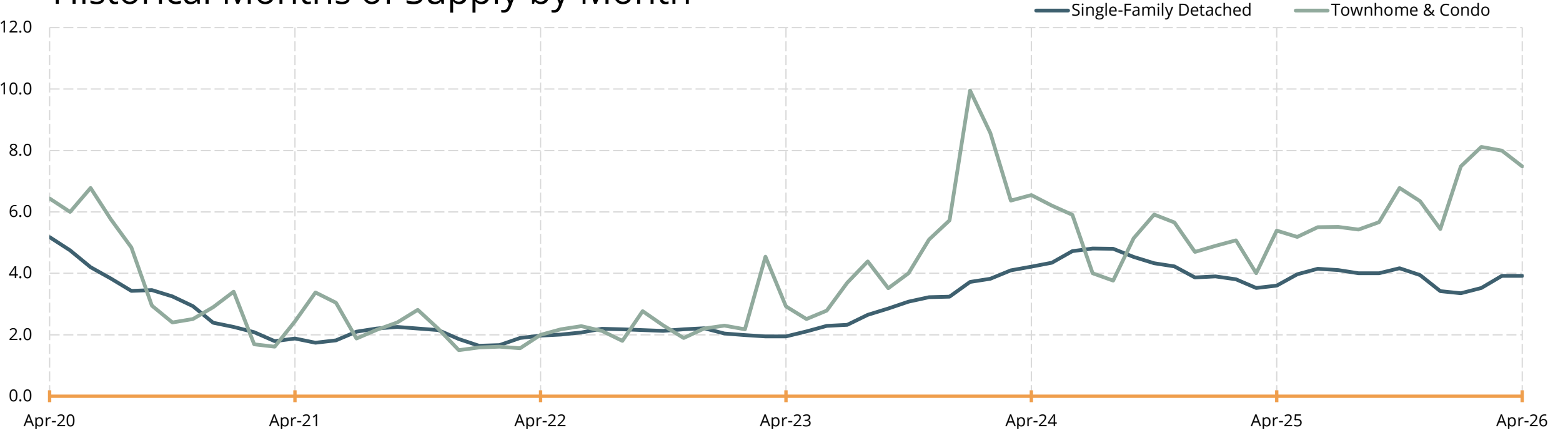


April



Month	Single-Family		Townhomes &	
	Detached	YoY Chg	Condos	YoY Chg
May-25	4.0	-8.7%	5.2	-16.4%
Jun-25	4.1	-12.2%	5.5	-6.8%
Jul-25	4.1	-14.5%	5.5	37.8%
Aug-25	4.0	-16.6%	5.4	44.2%
Sep-25	4.0	-11.7%	5.7	10.2%
Oct-25	4.2	-3.8%	6.8	14.7%
Nov-25	3.9	-6.7%	6.4	12.3%
Dec-25	3.4	-11.5%	5.4	15.9%
Jan-26	3.4	-14.2%	7.5	52.8%
Feb-26	3.5	-7.4%	8.1	59.9%
Mar-26	3.9	11.1%	8.0	100.0%
Apr-26	3.9	8.8%	7.5	38.7%
12-month Avg	3.9	-7.9%	6.4	26.9%

Historical Months of Supply by Month



Source: Virginia REALTORS®, data accessed May 15, 2026

Area Overview - Total Market



Geography	New Listings			Sales			Median Sales Price			Active Listings			Months Supply		
	Apr-25	Apr-26	% chg	Apr-25	Apr-26	% chg	Apr-25	Apr-26	% chg	Apr-25	Apr-26	% chg	Apr-25	Apr-26	% chg
Gloucester County	60	103	71.7%	43	46	7.0%	\$342,000	\$352,450	3.1%	141	185	31.2%	3.6	4.6	29.0%
King & Queen County	13	8	-38.5%	6	5	-16.7%	\$287,475	\$325,000	13.1%	13	21	61.5%	2.8	3.2	12.0%
King William County	48	43	-10.4%	27	34	25.9%	\$359,950	\$392,500	9.0%	83	91	9.6%	3.4	3.6	4.8%
Mathews County	23	19	-17.4%	10	12	20.0%	\$500,000	\$259,250	-48.2%	42	60	42.9%	4.0	5.4	35.2%
Middlesex County	33	38	15.2%	24	20	-16.7%	\$370,000	\$308,500	-16.6%	83	99	19.3%	4.5	5.7	26.9%

Area Overview - Total Market YTD



Geography	New Listings YTD			Sales YTD			Median Sales Price YTD			Active Listings YTD		
	Apr-25	Apr-26	% chg	Apr-25	Apr-26	% chg	Apr-25	Apr-26	% chg	Apr-25	Apr-26	% chg
Gloucester County	218	266	22.0%	130	132	1.5%	\$342,500	\$400,000	16.8%	141	185	31.2%
King & Queen County	33	36	9.1%	22	21	-4.5%	\$302,500	\$280,000	-7.4%	13	21	61.5%
King William County	175	174	-0.6%	100	94	-6.0%	\$350,000	\$379,950	8.6%	83	91	9.6%
Mathews County	78	75	-3.8%	40	38	-5.0%	\$432,500	\$299,950	-30.6%	42	60	42.9%
Middlesex County	110	124	12.7%	72	59	-18.1%	\$365,000	\$420,000	15.1%	83	99	19.3%

Area Overview - Single Family Detached Market



Geography	New Listings			Sales			Median Sales Price			Active Listings			Months Supply		
	Apr-25	Apr-26	% chg	Apr-25	Apr-26	% chg	Apr-25	Apr-26	% chg	Apr-25	Apr-26	% chg	Apr-25	Apr-26	% chg
Gloucester County	56	99	76.8%	43	44	2.3%	\$342,000	\$352,450	3.1%	135	178	31.9%	3.6	3.7	2.5%
King & Queen County	13	8	-38.5%	6	5	-16.7%	\$287,475	\$325,000	13.1%	13	21	61.5%	2.8	3.4	21.2%
King William County	39	36	-7.7%	22	31	40.9%	\$387,288	\$399,950	3.3%	61	59	-3.3%	2.8	2.7	-1.8%
Mathews County	23	19	-17.4%	10	12	20.0%	\$500,000	\$259,250	-48.2%	42	60	42.9%	4.0	5.6	40.9%
Middlesex County	32	37	15.6%	24	18	-25.0%	\$370,000	\$308,500	-16.6%	81	95	17.3%	4.7	5.1	8.6%

Area Overview - Single Family Detached Market YTD



New Listings YTD				Sales YTD			Median Sales Price YTD			Active Listings YTD		
Geography	Apr-25	Apr-26	% chg	Apr-25	Apr-26	% chg	Apr-25	Apr-26	% chg	Apr-25	Apr-26	% chg
Gloucester County	210	256	21.9%	127	127	0.0%	\$341,000	\$402,500	18.0%	135	178	31.9%
King & Queen County	33	36	9.1%	22	21	-4.5%	\$302,500	\$280,000	-7.4%	13	21	61.5%
King William County	154	140	-9.1%	88	82	-6.8%	\$355,000	\$382,500	7.7%	61	59	-3.3%
Mathews County	77	74	-3.9%	39	38	-2.6%	\$435,000	\$299,950	-31.0%	42	60	42.9%
Middlesex County	104	117	12.5%	71	56	-21.1%	\$356,675	\$422,500	18.5%	81	95	17.3%

Area Overview - Townhome & Condo Market



Geography	New Listings			Sales			Median Sales Price			Active Listings			Months Supply		
	Apr-25	Apr-26	% chg	Apr-25	Apr-26	% chg	Apr-25	Apr-26	% chg	Apr-25	Apr-26	% chg	Apr-25	Apr-26	% chg
Gloucester County	4	4	0.0%	0	2	n/a	\$0	\$359,650	n/a	6	7	16.7%	3.1	3.4	7.3%
King & Queen County	0	0	n/a	0	0	n/a	\$0	\$0	n/a	0	0	n/a	0.0	0.0	n/a
King William County	9	7	-22.2%	5	3	-40.0%	\$319,950	\$299,000	-6.5%	22	32	45.5%	8.8	10.7	21.2%
Mathews County	0	0	n/a	0	0	n/a	\$0	\$0	n/a	0	0	n/a	0.0	0.0	n/a
Middlesex County	1	1	0.0%	0	2	n/a	\$0	\$350,500	n/a	2	4	100.0%	2.4	6.9	185.7%

Area Overview - Townhome & Condo Market YTD



Geography	New Listings YTD			Sales YTD			Median Sales Price YTD			Active Listings YTD		
	Apr-25	Apr-26	% chg	Apr-25	Apr-26	% chg	Apr-25	Apr-26	% chg	Apr-25	Apr-26	% chg
Gloucester County	8	10	25.0%	3	5	66.7%	\$356,400	\$354,000	-0.7%	6	7	16.7%
King & Queen County	0	0	n/a	0	0	n/a	\$0	\$0	n/a	0	0	n/a
King William County	21	34	61.9%	12	12	0.0%	\$330,000	\$300,975	-8.8%	22	32	45.5%
Mathews County	1	1	0.0%	1	0	-100.0%	\$298,500	\$0	-100.0%	0	0	n/a
Middlesex County	6	7	16.7%	1	3	200.0%	\$389,995	\$340,000	-12.8%	2	4	100.0%



The Virginia REALTORS® association is the largest professional trade association in Virginia, representing 35,000 REALTORS® engaged in the residential and commercial real estate business. The Virginia REALTORS® association serves as the advocate for homeownership and private property rights and represents the interests of real estate professionals and property owners in the Commonwealth of Virginia.

NOTE: The term REALTOR® is a registered collective membership mark that identifies a real estate professional who is a member of the National Association of REALTORS® and subscribes to its strict code of ethics.

All inquiries regarding this report may be directed to:

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804-622-7954

Data and analysis provided by Virginia REALTORS® Research Team

The numbers reported here are preliminary and based on current entries into multiple listing services. Over time, data may be adjusted slightly to reflect increased reporting. Information is sourced from multiple listing services across Virginia and is deemed reliable, but not guaranteed.