

Local Market Update for February 2026

A Research Tool Provided by the Minnesota REALTORS®

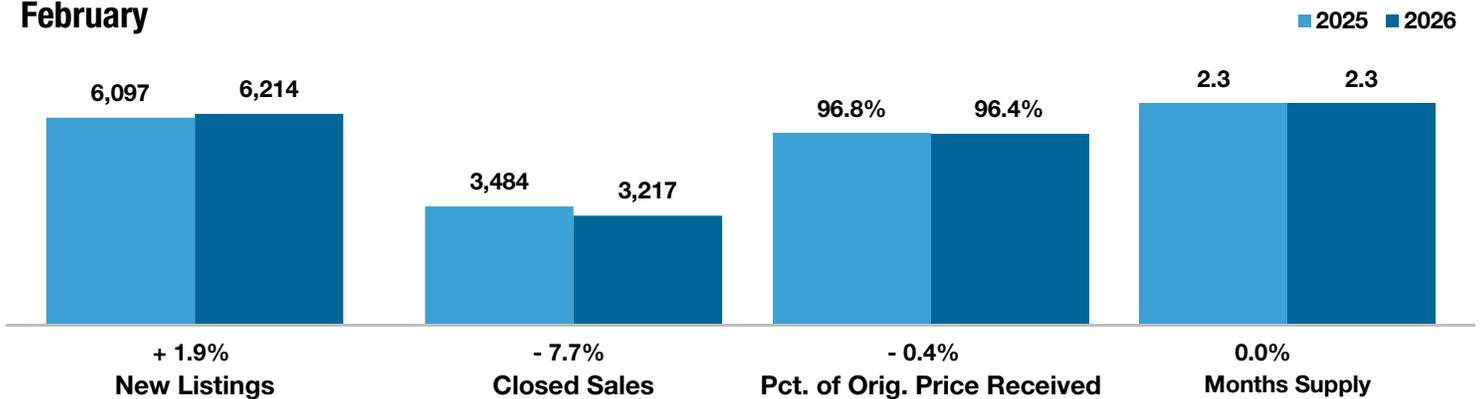


Entire State

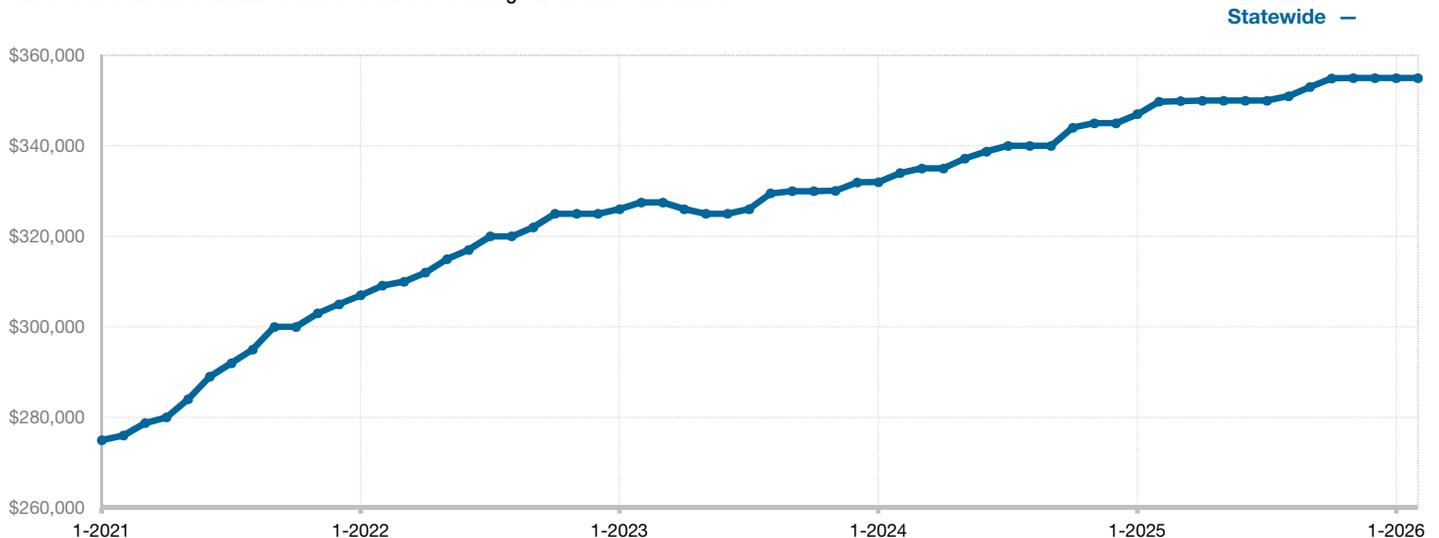
Key Metrics	February			Year to Date		
	2025	2026	Percent Change	Thru 2-2025	Thru 2-2026	Percent Change
New Listings	6,097	6,214	+ 1.9%	11,879	11,586	- 2.5%
Pending Sales	4,339	4,199	- 3.2%	8,123	7,625	- 6.1%
Closed Sales	3,484	3,217	- 7.7%	7,043	6,267	- 11.0%
Median Sales Price*	\$345,000	\$339,900	- 1.5%	\$338,700	\$338,000	- 0.2%
Percent of Original List Price Received*	96.8%	96.4%	- 0.4%	96.4%	96.2%	- 0.2%
Days on Market Until Sale	59	64	+ 8.5%	57	62	+ 8.8%
Months Supply of Inventory	2.3	2.3	0.0%	--	--	--

* Does not account for sale concessions and/or down payment assistance. Note: Activity for one month can sometimes look extreme due to small sample size.

February



Historical Median Sales Price Rolling 12-Month Calculation



Monthly Indicators



February 2026

Residential real estate activity composed of single-family properties, townhomes and condominiums combined. Percent changes are calculated using rounded figures.

Activity Snapshot

- 7.7% **- 1.5%** **+ 1.9%**

One-Year Change in Closed Sales	One-Year Change in Median Sales Price	One-Year Change in New Listings
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Activity Overview



Key metrics by report month and for year-to-date (YTD) starting from the first of the year.

Key Metrics	Historical Sparkbars	2-2025	2-2026	Percent Change	YTD 2025	YTD 2026	Percent Change
New Listings		6,097	6,214	+ 1.9%	11,879	11,586	- 2.5%
Pending Sales		4,339	4,199	- 3.2%	8,123	7,625	- 6.1%
Closed Sales		3,484	3,217	- 7.7%	7,043	6,267	- 11.0%
Days on Market		59	64	+ 8.5%	57	62	+ 8.8%
Median Sales Price		\$345,000	\$339,900	- 1.5%	\$338,700	\$338,000	- 0.2%
Avg. Sales Price		\$406,059	\$396,687	- 2.3%	\$396,397	\$396,789	+ 0.1%
Pct. of Orig. Price Received		96.8%	96.4%	- 0.4%	96.4%	96.2%	- 0.2%
Affordability Index		93	101	+ 8.6%	95	102	+ 7.4%
Homes for Sale*		12,634	13,106	+ 3.7%	--	--	--
Months Supply*		2.3	2.3	0.0%	--	--	--

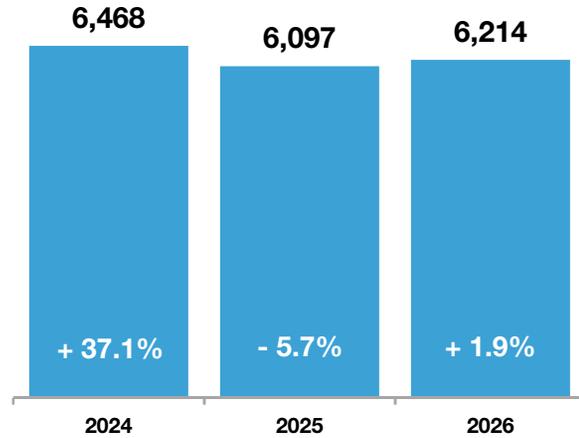
* Statewide inventory before 2012 was overstated due to changes made in NorthstarMLS. However, an "Expired" field was made available in 2012 by some multiple listing services, allowing expired listings to be separated from active listings, providing more accurate views of inventory and supply.

New Listings

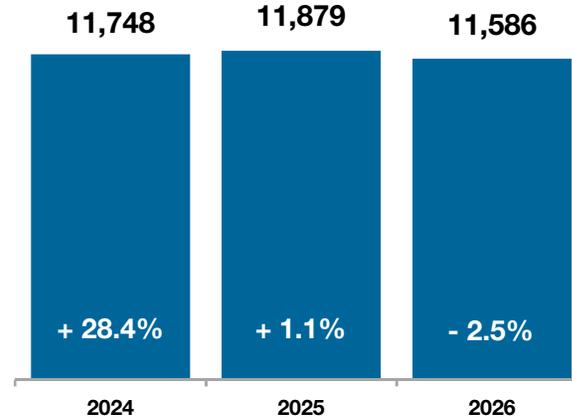
A count of the properties that have been newly listed on the market in a given month.



February

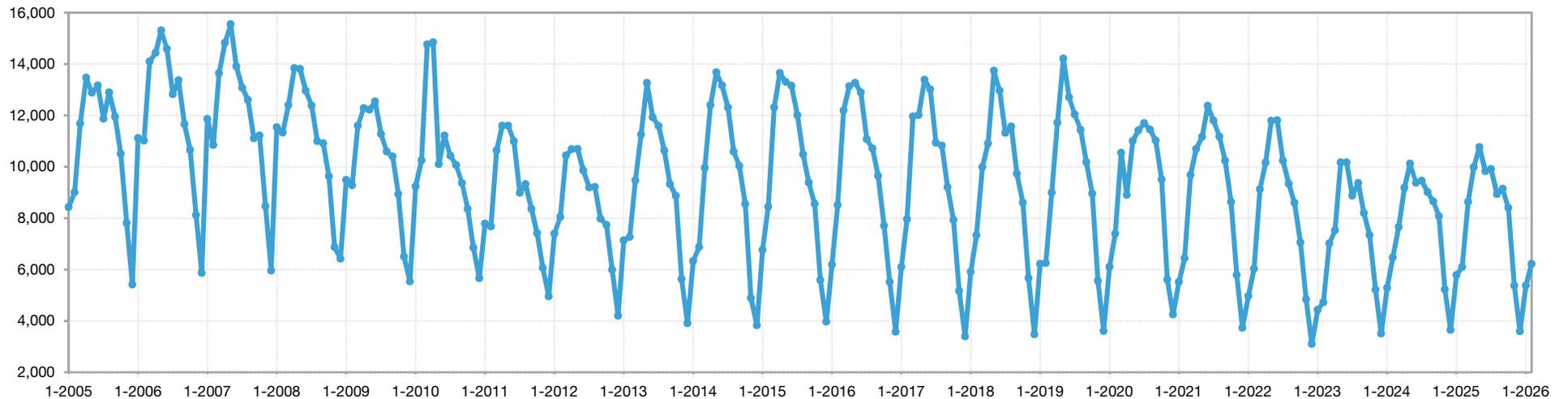


Year to Date



	New Listings	Prior Year	Percent Change
March 2025	8,634	7,652	+12.8%
April 2025	9,981	9,184	+8.7%
May 2025	10,767	10,116	+6.4%
June 2025	9,831	9,373	+4.9%
July 2025	9,909	9,456	+4.8%
August 2025	8,931	9,013	-0.9%
September 2025	9,148	8,651	+5.7%
October 2025	8,402	8,075	+4.0%
November 2025	5,374	5,218	+3.0%
December 2025	3,595	3,647	-1.4%
January 2026	5,372	5,782	-7.1%
February 2026	6,214	6,097	+1.9%
12-Month Avg	8,013	7,689	+4.2%

Historical New Listings by Month

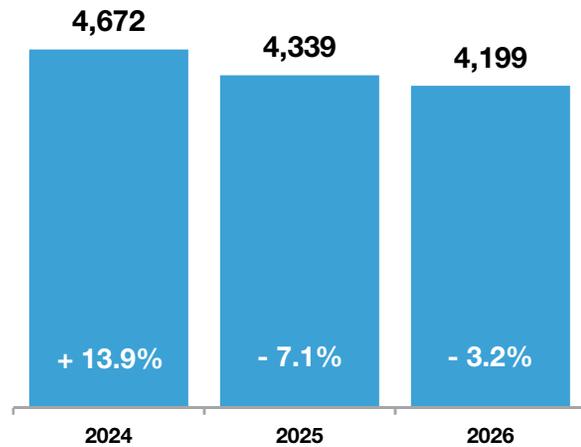


Pending Sales

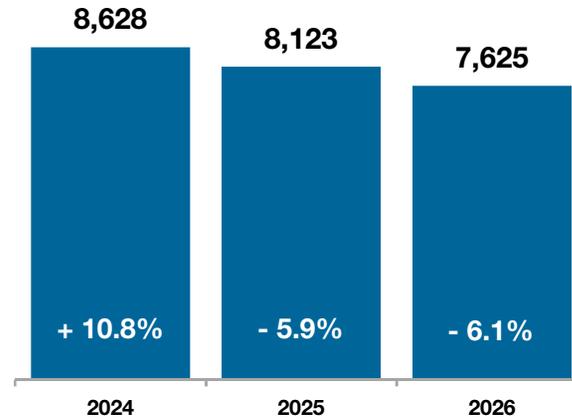
A count of the properties on which offers have been accepted in a given month.



February

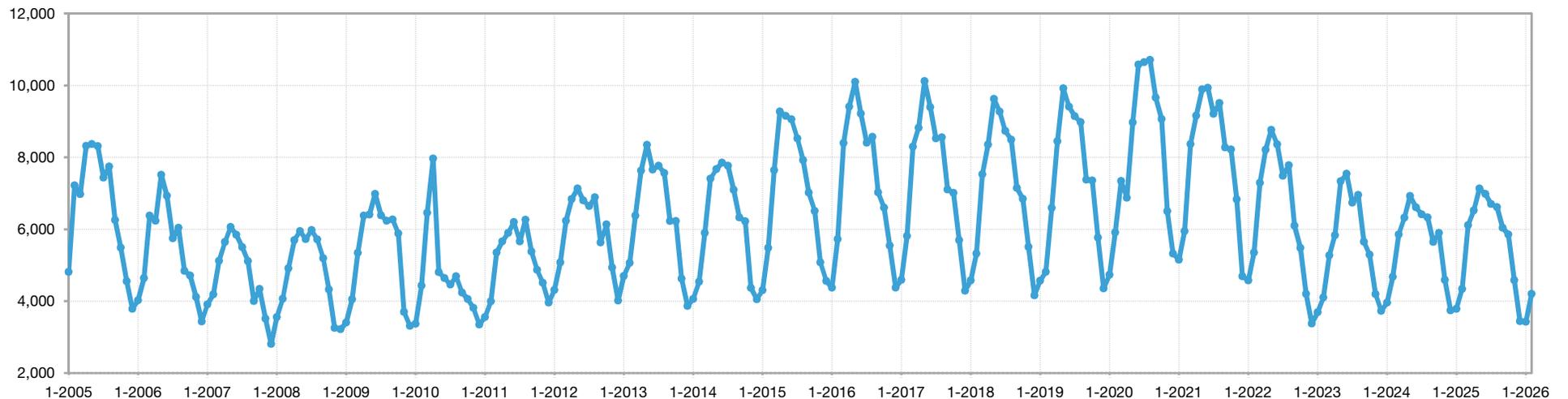


Year to Date



	Pending Sales	Prior Year	Percent Change
March 2025	6,108	5,852	+4.4%
April 2025	6,518	6,319	+3.1%
May 2025	7,129	6,923	+3.0%
June 2025	6,977	6,606	+5.6%
July 2025	6,698	6,413	+4.4%
August 2025	6,614	6,327	+4.5%
September 2025	6,039	5,645	+7.0%
October 2025	5,854	5,897	-0.7%
November 2025	4,580	4,587	-0.2%
December 2025	3,441	3,742	-8.0%
January 2026	3,426	3,784	-9.5%
February 2026	4,199	4,339	-3.2%
12-Month Avg	5,632	5,536	+1.7%

Historical Pending Sales by Month

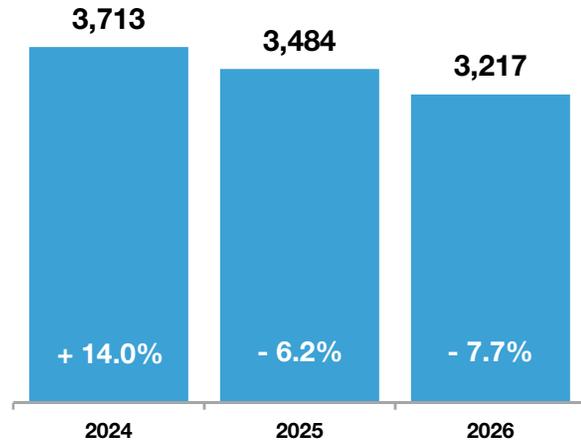


Closed Sales

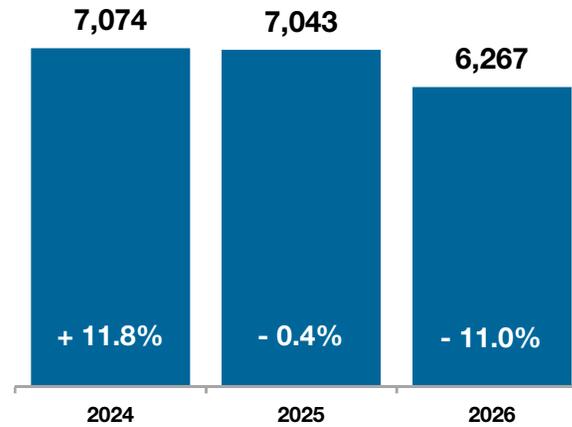
A count of the actual sales that closed in a given month.



February

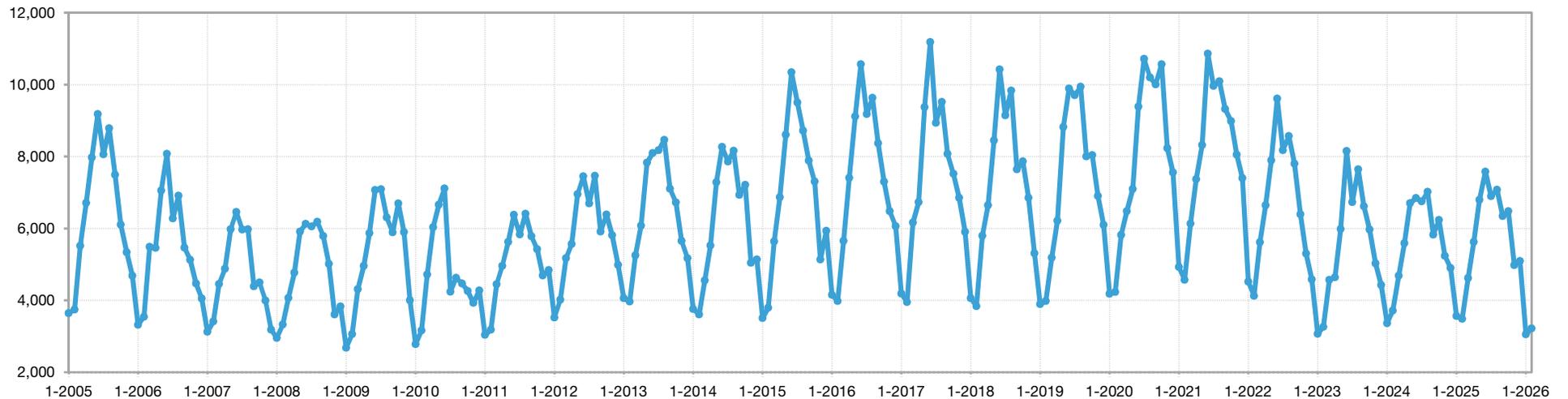


Year to Date



	Closed Sales	Prior Year	Percent Change
March 2025	4,621	4,685	-1.4%
April 2025	5,621	5,584	+0.7%
May 2025	6,792	6,700	+1.4%
June 2025	7,577	6,842	+10.7%
July 2025	6,893	6,752	+2.1%
August 2025	7,077	7,014	+0.9%
September 2025	6,339	5,824	+8.8%
October 2025	6,475	6,236	+3.8%
November 2025	4,975	5,234	-4.9%
December 2025	5,093	4,901	+3.9%
January 2026	3,050	3,559	-14.3%
February 2026	3,217	3,484	-7.7%
12-Month Avg	5,644	5,568	+1.4%

Historical Closed Sales by Month

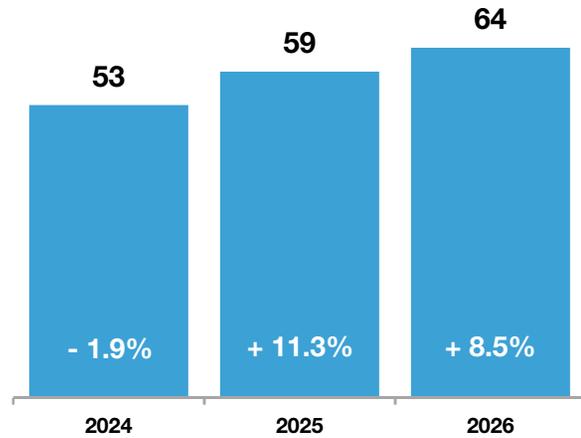


Days on Market Until Sale

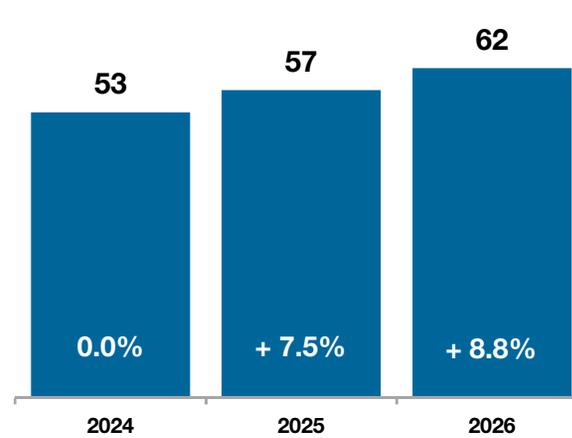


Average number of days between when a property is listed and when an offer is accepted in a given month.

February

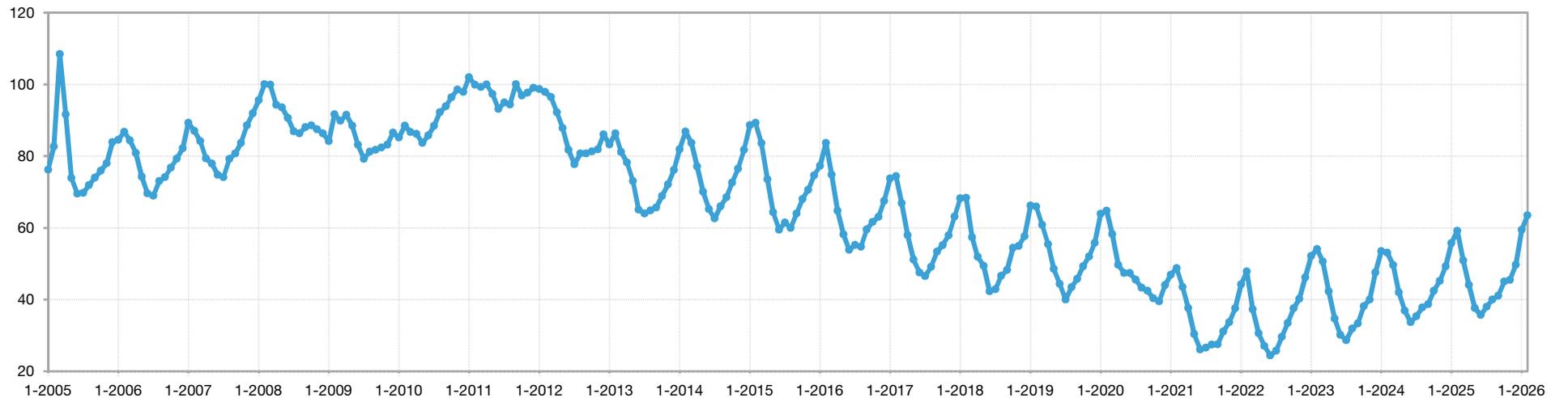


Year to Date



Days on Market	Prior Year	Percent Change
March 2025	51	+2.0%
April 2025	44	+4.8%
May 2025	38	+2.7%
June 2025	36	+5.9%
July 2025	38	+8.6%
August 2025	40	+5.3%
September 2025	41	+5.1%
October 2025	45	+7.1%
November 2025	45	0.0%
December 2025	50	+2.0%
January 2026	59	+5.4%
February 2026	64	+8.5%
12-Month Avg	46	+4.5%

Historical Days on Market Until Sale by Month

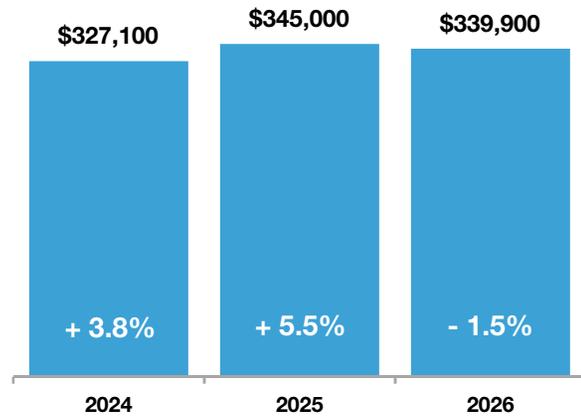


Median Sales Price

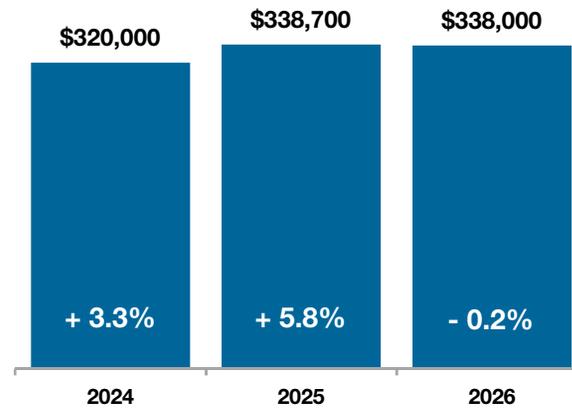


Point at which half of the sales sold for more and half sold for less, not accounting for seller concessions, in a given month.

February

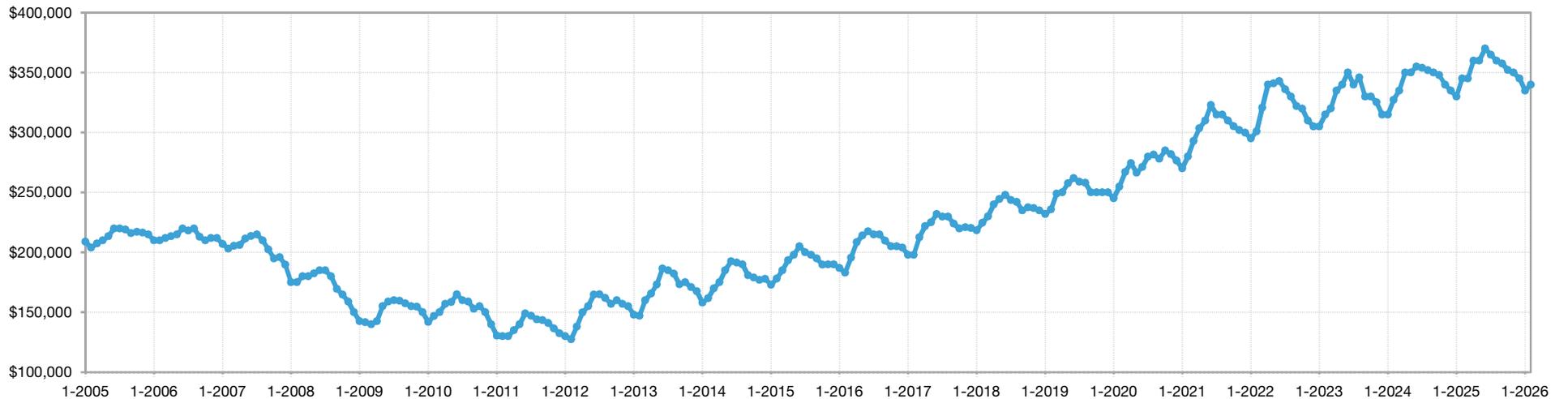


Year to Date



Month	Median Sales Price	Prior Year	Percent Change
March 2025	\$345,000	\$335,000	+3.0%
April 2025	\$360,000	\$350,000	+2.9%
May 2025	\$359,990	\$350,000	+2.9%
June 2025	\$370,000	\$355,000	+4.2%
July 2025	\$365,000	\$354,000	+3.1%
August 2025	\$360,000	\$352,000	+2.3%
September 2025	\$357,500	\$350,000	+2.1%
October 2025	\$352,111	\$347,850	+1.2%
November 2025	\$350,000	\$340,000	+2.9%
December 2025	\$345,000	\$335,000	+3.0%
January 2026	\$335,000	\$330,000	+1.5%
February 2026	\$339,900	\$345,000	-1.5%
12-Month Avg	\$353,292	\$345,321	+2.3%

Historical Median Sales Price by Month

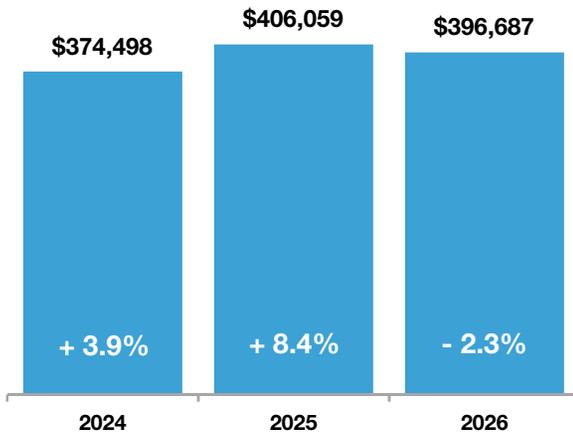


Average Sales Price

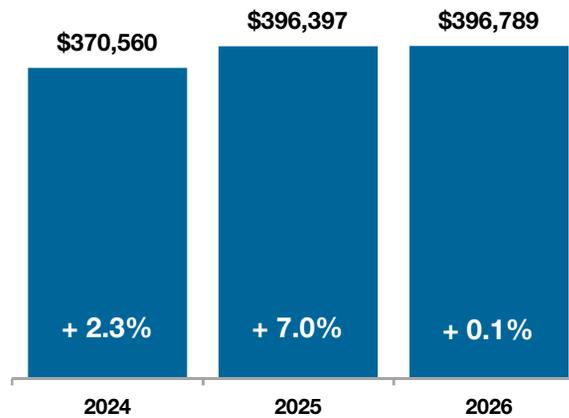
Average sales price for all closed sales, not accounting for seller concessions, in a given month.



February

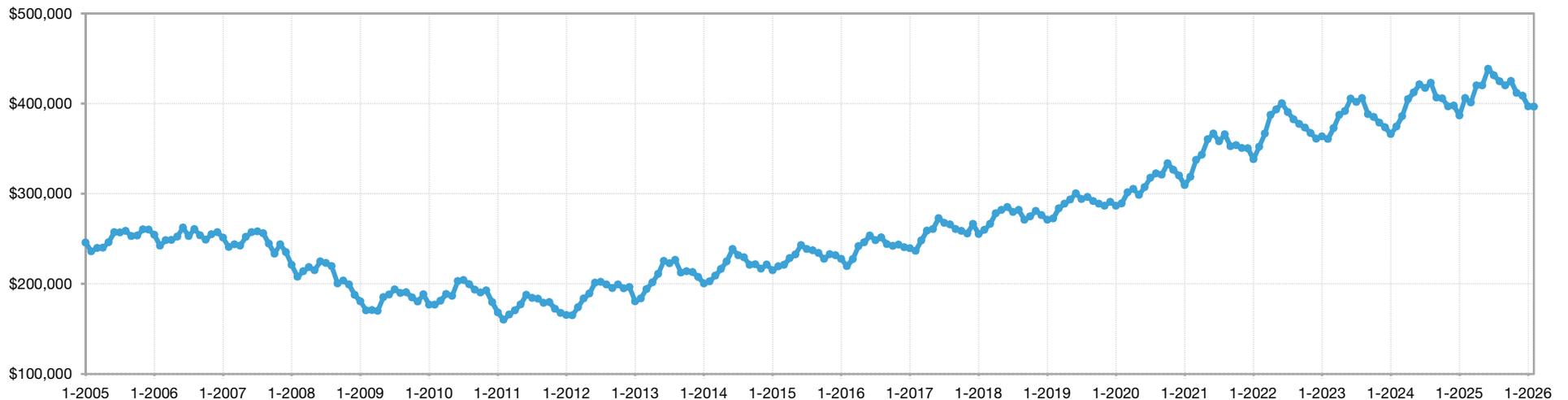


Year to Date



	Average Sales Price	Prior Year	Percent Change
March 2025	\$401,259	\$386,081	+3.9%
April 2025	\$420,308	\$405,052	+3.8%
May 2025	\$420,280	\$412,420	+1.9%
June 2025	\$438,635	\$421,341	+4.1%
July 2025	\$431,341	\$417,335	+3.4%
August 2025	\$424,758	\$422,956	+0.4%
September 2025	\$420,306	\$406,655	+3.4%
October 2025	\$425,114	\$405,943	+4.7%
November 2025	\$411,708	\$396,936	+3.7%
December 2025	\$408,711	\$397,834	+2.7%
January 2026	\$396,897	\$386,947	+2.6%
February 2026	\$396,687	\$406,059	-2.3%
12-Month Avg	\$416,334	\$405,463	+2.7%

Historical Average Sales Price by Month

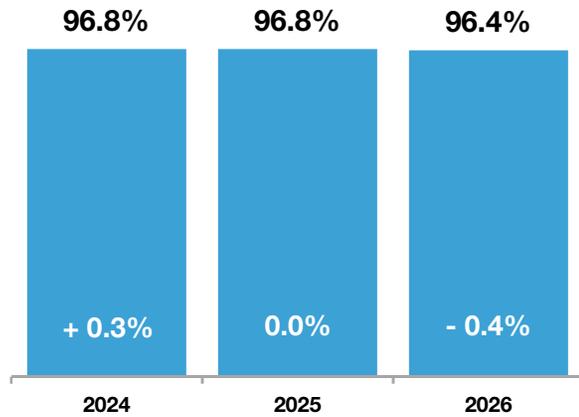


Percent of Original List Price Received

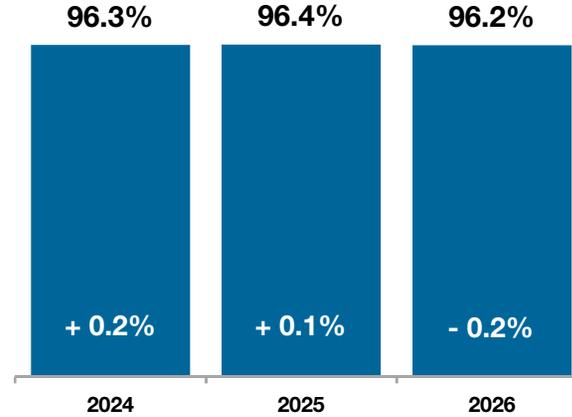


Percentage found when dividing a property's sales price by its original list price, then taking the average for all properties sold in a given month, not accounting for seller concessions.

February

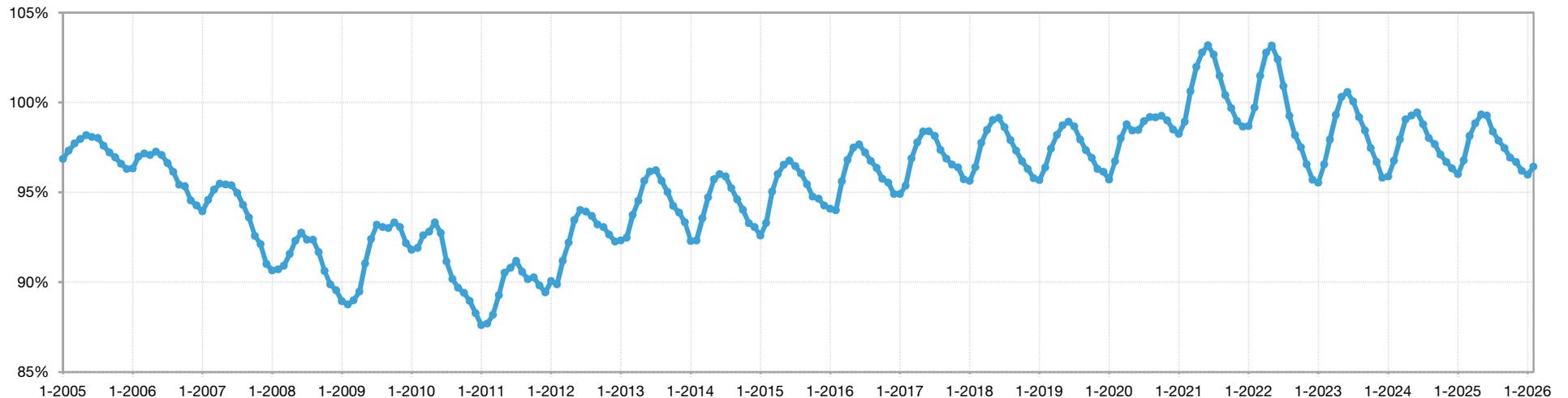


Year to Date



	Pct. of Orig. Price Received	Prior Year	Percent Change
March 2025	98.1%	98.0%	+0.1%
April 2025	98.8%	99.1%	-0.3%
May 2025	99.3%	99.3%	0.0%
June 2025	99.3%	99.4%	-0.1%
July 2025	98.4%	98.8%	-0.4%
August 2025	97.9%	98.0%	-0.1%
September 2025	97.5%	97.7%	-0.2%
October 2025	96.9%	97.1%	-0.2%
November 2025	96.7%	96.7%	0.0%
December 2025	96.2%	96.3%	-0.1%
January 2026	96.0%	96.0%	0.0%
February 2026	96.4%	96.8%	-0.4%
12-Month Avg	97.6%	97.8%	-0.2%

Historical Percent of Original List Price Received by Month

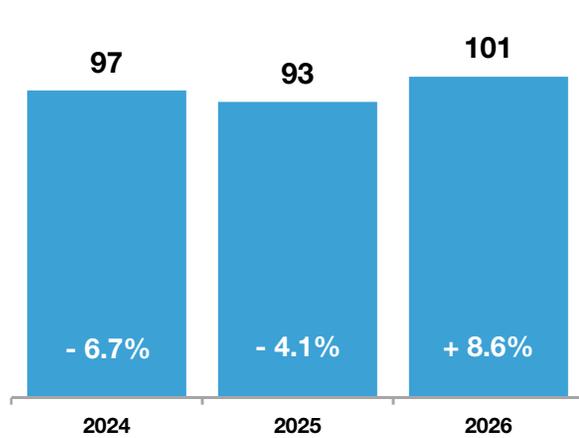


Housing Affordability Index

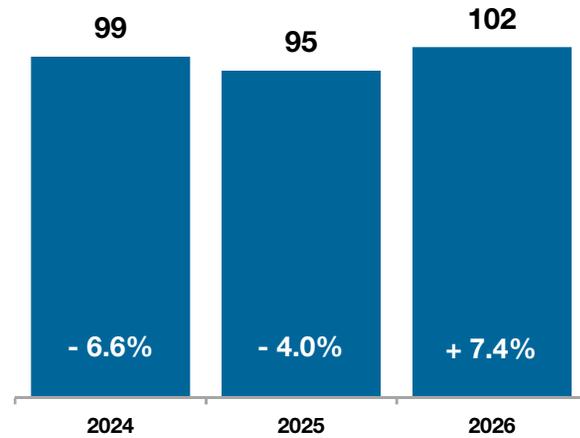


This index measures housing affordability for the region. For example, an index of 120 means the median household income is 120% of what is necessary to qualify for the median-priced home under prevailing interest rates. A higher number means greater affordability.

February

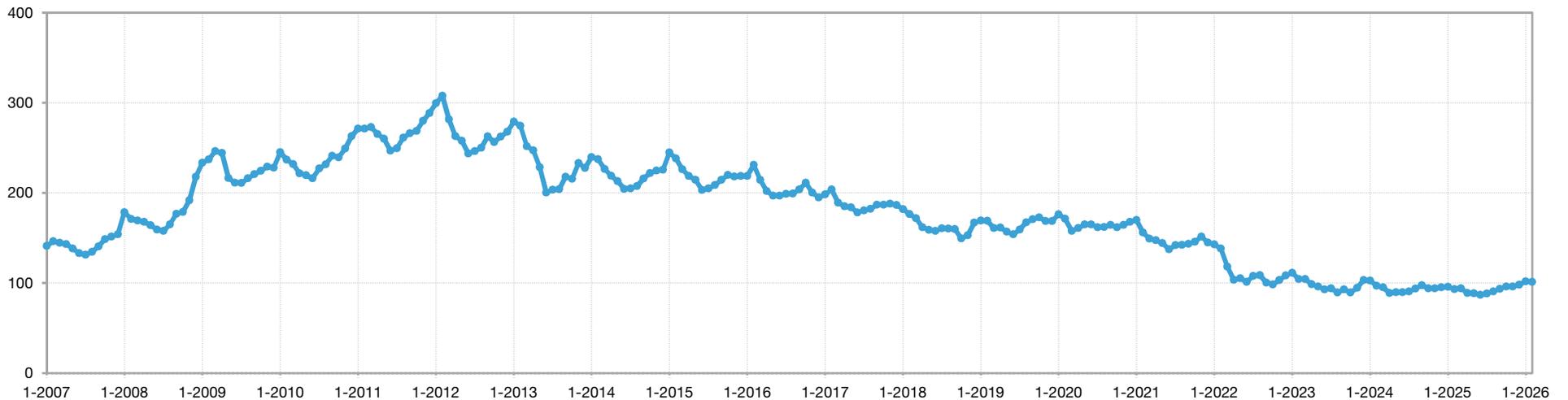


Year to Date



Affordability Index		Prior Year	Percent Change
March 2025	94	95	-1.1%
April 2025	89	89	0.0%
May 2025	89	90	-1.1%
June 2025	87	90	-3.3%
July 2025	88	91	-3.3%
August 2025	91	94	-3.2%
September 2025	94	97	-3.1%
October 2025	96	94	+2.1%
November 2025	96	94	+2.1%
December 2025	98	95	+3.2%
January 2026	102	96	+6.3%
February 2026	101	93	+8.6%
12-Month Avg	94	93	+1.1%

Historical Housing Affordability Index by Month

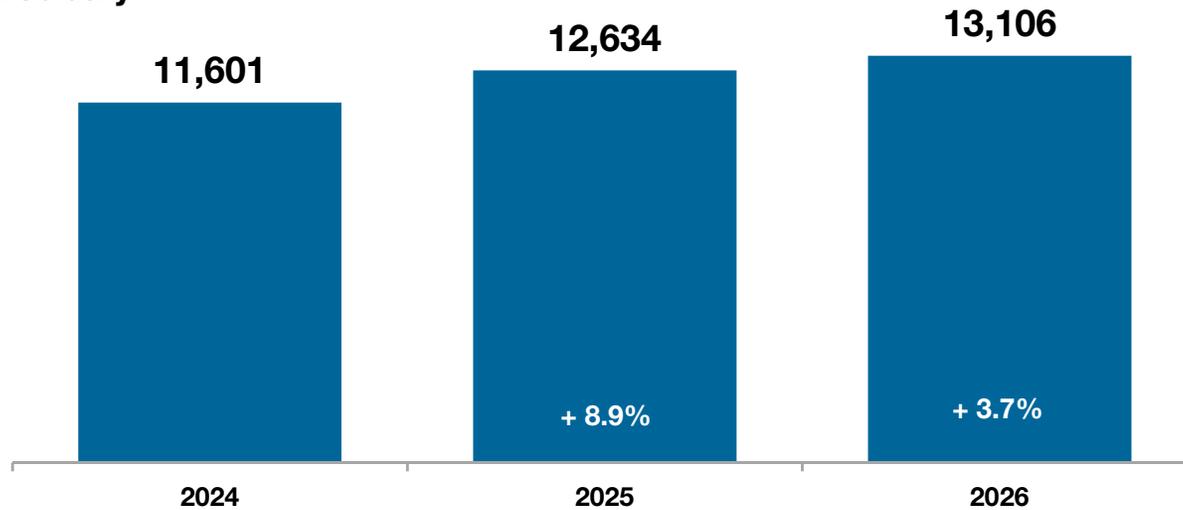


Inventory of Homes for Sale

The number of properties available for sale in active status at the end of a given month.

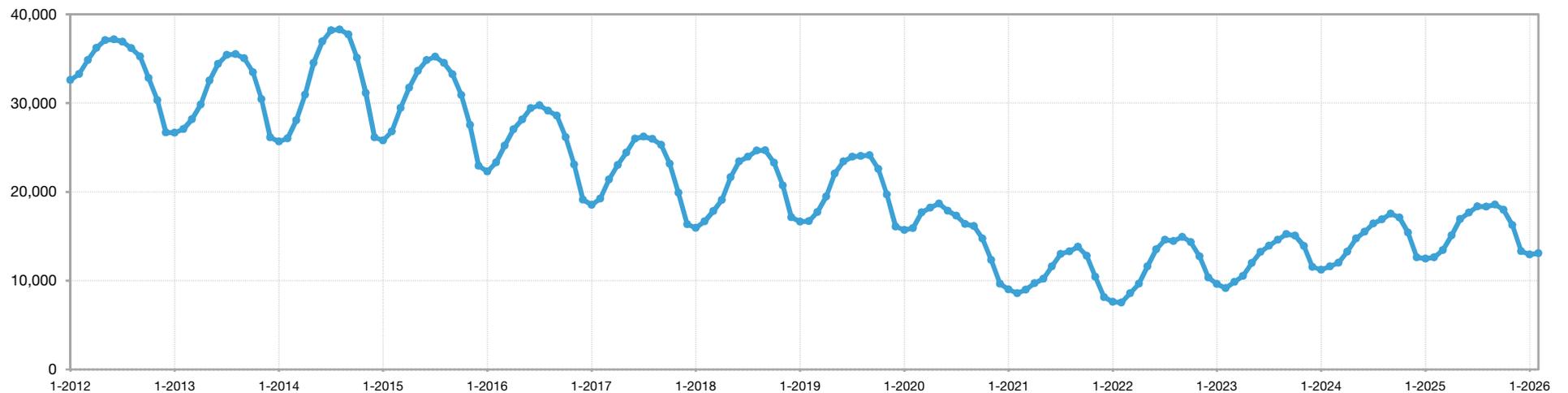


February



Homes for Sale		Prior Year	Percent Change
March 2025	13,431	12,018	+11.8%
April 2025	15,114	13,263	+14.0%
May 2025	16,951	14,749	+14.9%
June 2025	17,659	15,526	+13.7%
July 2025	18,363	16,439	+11.7%
August 2025	18,326	16,921	+8.3%
September 2025	18,569	17,556	+5.8%
October 2025	17,996	17,106	+5.2%
November 2025	16,267	15,411	+5.6%
December 2025	13,325	12,631	+5.5%
January 2026	12,953	12,482	+3.8%
February 2026	13,106	12,634	+3.7%

Historical Inventory of Homes for Sale by Month



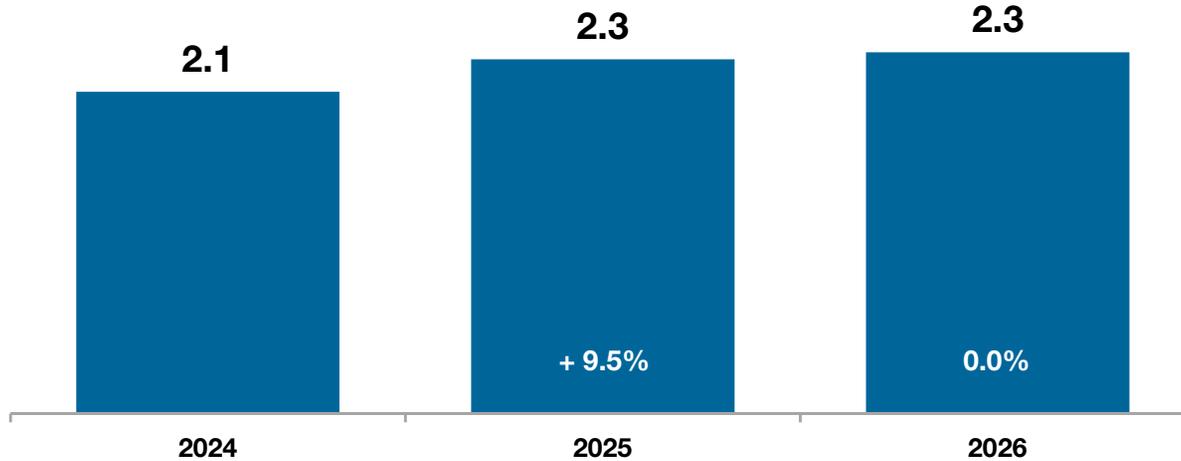
Note: Statewide inventory before 2012 was overstated due to changes made in NorthstarMLS. However, an "Expired" field was made available in 2012 by some multiple listing services, allowing expired listings to be separated from active listings, providing a more accurate view of inventory.

Months Supply of Inventory



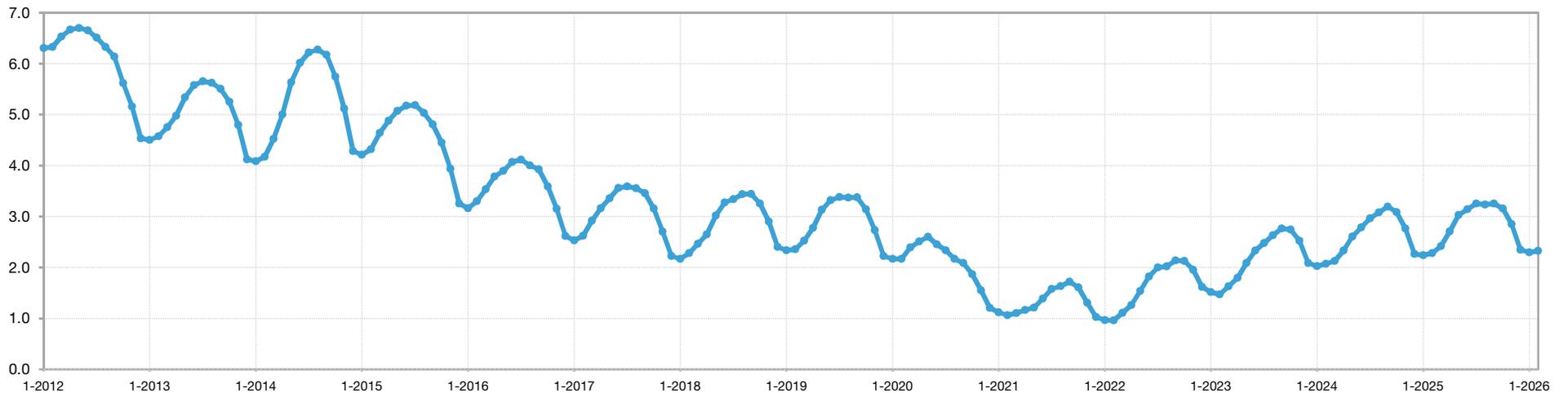
The inventory of homes for sale at the end of a given month, divided by the average monthly pending sales from the last 12 months.

February



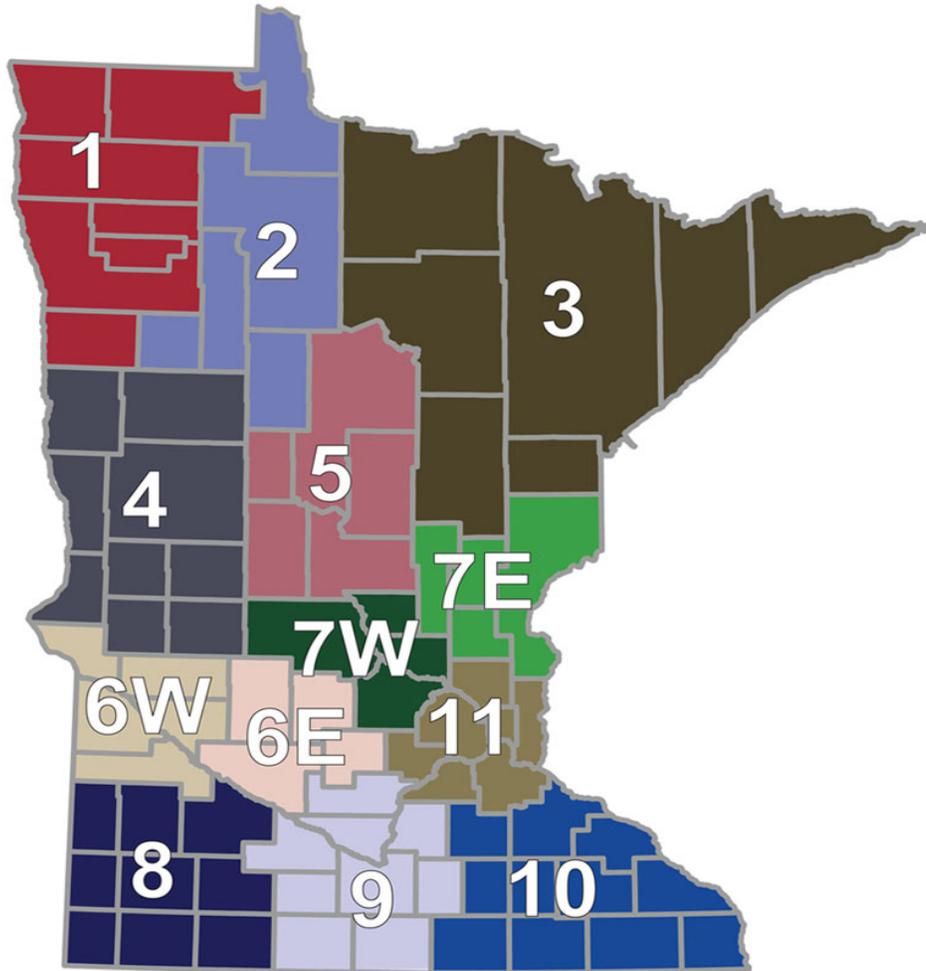
Months Supply		Prior Year	Percent Change
March 2025	2.4	2.1	+14.3%
April 2025	2.7	2.3	+17.4%
May 2025	3.0	2.6	+15.4%
June 2025	3.1	2.8	+10.7%
July 2025	3.3	3.0	+10.0%
August 2025	3.2	3.1	+3.2%
September 2025	3.3	3.2	+3.1%
October 2025	3.2	3.1	+3.2%
November 2025	2.9	2.8	+3.6%
December 2025	2.3	2.3	0.0%
January 2026	2.3	2.2	+4.5%
February 2026	2.3	2.3	0.0%

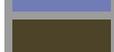
Historical Months Supply of Inventory by Month



Note: Statewide inventory before 2012 was overstated due to changes made in NorthstarMLS. However, an "Expired" field was made available in 2012 by some multiple listing services, allowing expired listings to be separated from active listings, providing a more accurate view of supply.

Minnesota Regional Development Organizations



- | | | | |
|---|------------------------------------|---|----------------------------------|
|  | 1 - Northwest Region |  | 7E - East Central Region |
|  | 2 - Headwaters Region |  | 7W - Central Region |
|  | 3 - Arrowhead Region |  | 8 - Southwest Region |
|  | 4 - West Central Region |  | 9 - South Central Region |
|  | 5 - North Central Region |  | 10 - Southeast Region |
|  | 6E - Southwest Central Region |  | 11 - 7-County Twin Cities Region |
|  | 6W - Upper Minnesota Valley Region | | |

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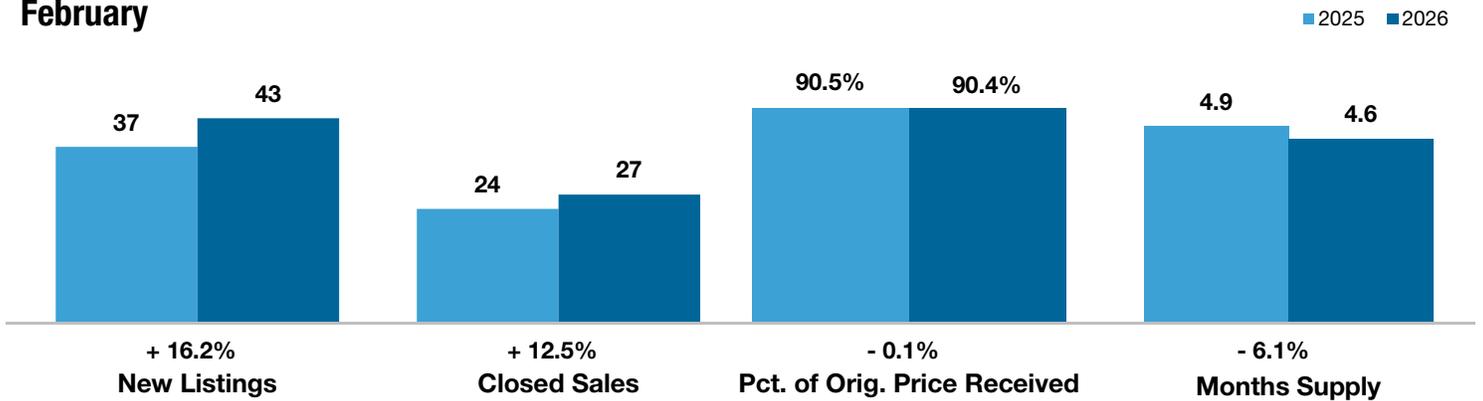


1 – Northwest Region

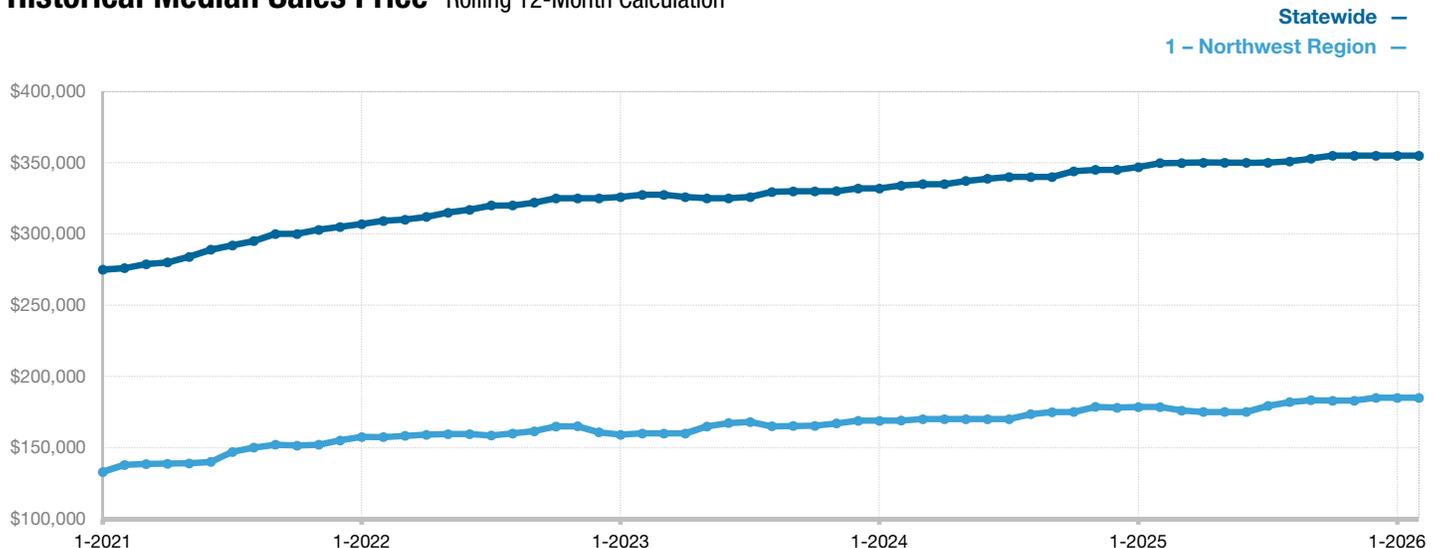
Key Metrics	February			Year to Date		
	2025	2026	Percent Change	Thru 2-2025	Thru 2-2026	Percent Change
New Listings	37	43	+ 16.2%	57	84	+ 47.4%
Pending Sales	23	20	- 13.0%	55	49	- 10.9%
Closed Sales	24	27	+ 12.5%	55	45	- 18.2%
Median Sales Price*	\$160,000	\$142,000	- 11.3%	\$182,250	\$180,000	- 1.2%
Percent of Original List Price Received*	90.5%	90.4%	- 0.1%	90.8%	91.2%	+ 0.4%
Days on Market Until Sale	128	98	- 23.4%	98	111	+ 13.3%
Months Supply of Inventory	4.9	4.6	- 6.1%	--	--	--

* Does not account for sale concessions and/or down payment assistance. Note: Activity for one month can sometimes look extreme due to small sample size.

February



Historical Median Sales Price Rolling 12-Month Calculation



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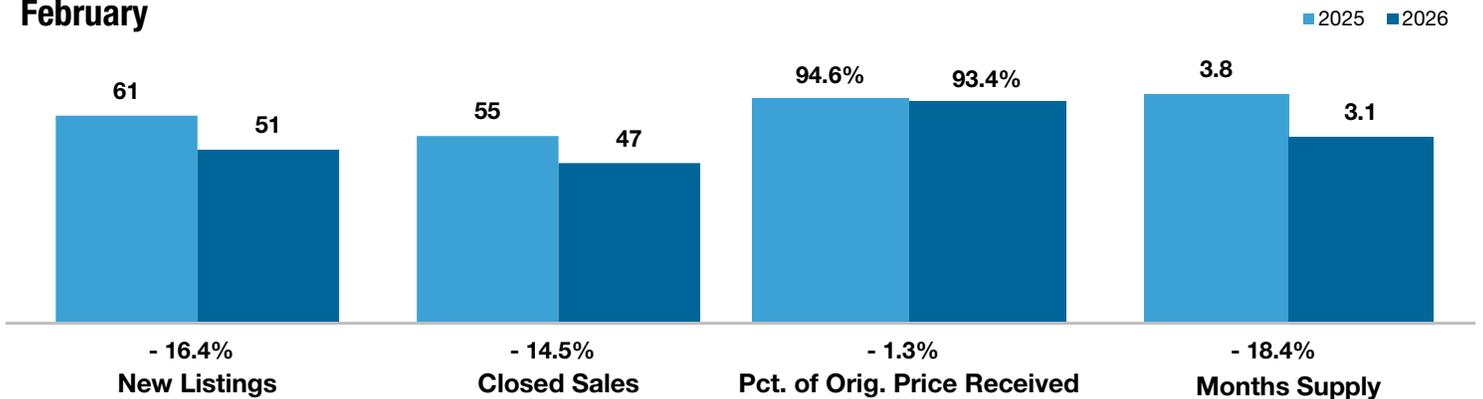


2 – Headwaters Region

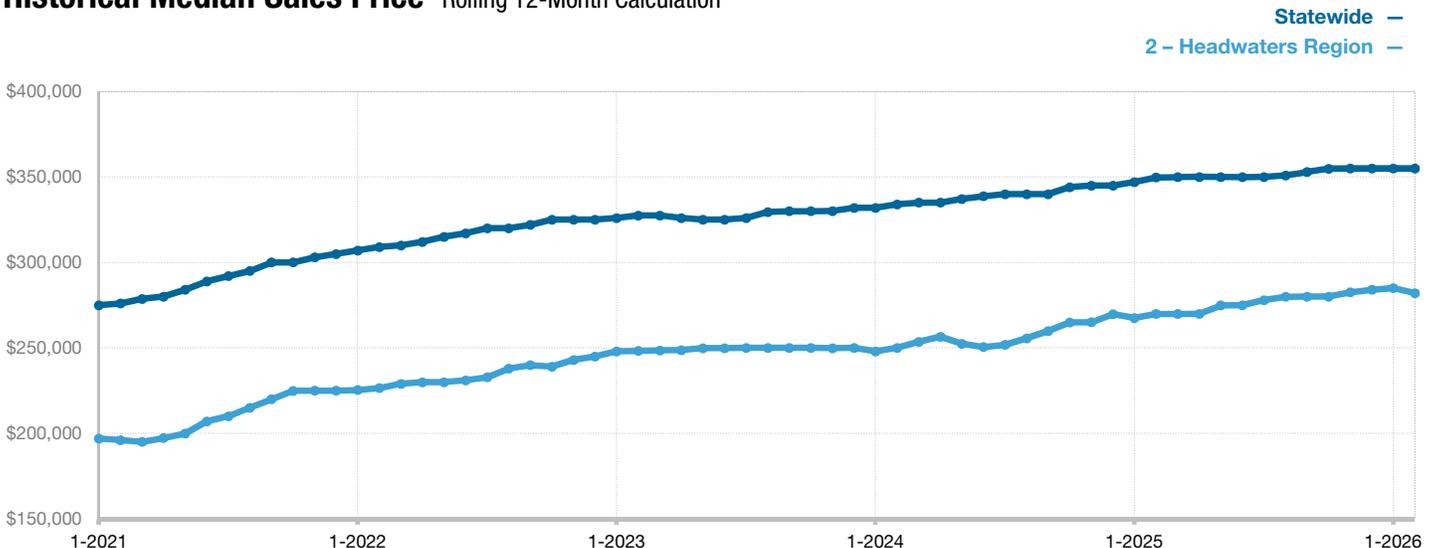
Key Metrics	February			Year to Date		
	2025	2026	Percent Change	Thru 2-2025	Thru 2-2026	Percent Change
New Listings	61	51	- 16.4%	115	101	- 12.2%
Pending Sales	54	60	+ 11.1%	100	111	+ 11.0%
Closed Sales	55	47	- 14.5%	98	84	- 14.3%
Median Sales Price*	\$300,000	\$275,000	- 8.3%	\$269,936	\$268,700	- 0.5%
Percent of Original List Price Received*	94.6%	93.4%	- 1.3%	94.1%	93.6%	- 0.5%
Days on Market Until Sale	84	99	+ 17.9%	88	95	+ 8.0%
Months Supply of Inventory	3.8	3.1	- 18.4%	--	--	--

* Does not account for sale concessions and/or down payment assistance. Note: Activity for one month can sometimes look extreme due to small sample size.

February



Historical Median Sales Price Rolling 12-Month Calculation



Local Market Update for February 2026

A Research Tool Provided by the Minnesota REALTORS®

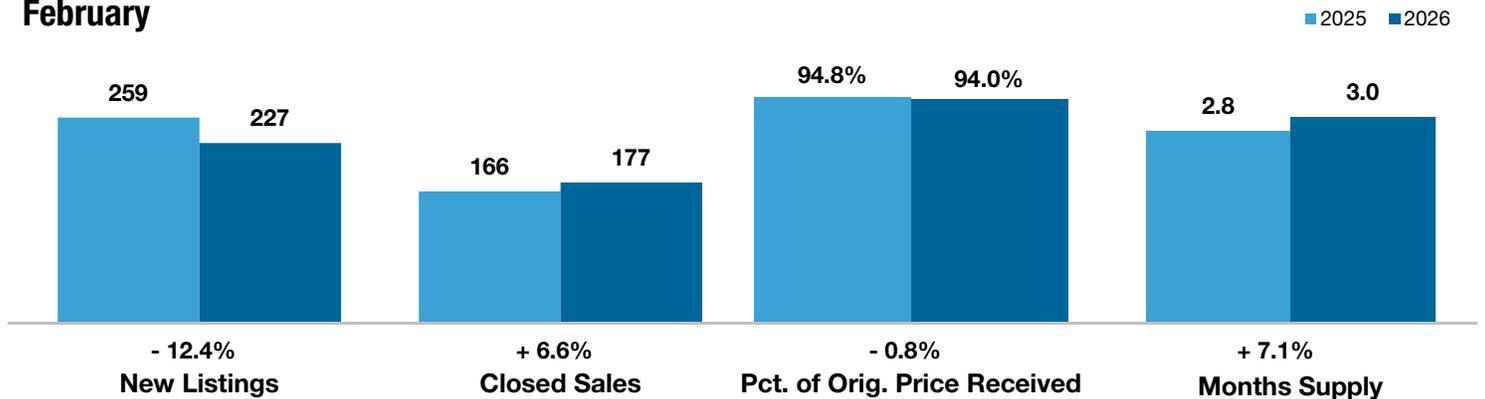


3 – Arrowhead Region

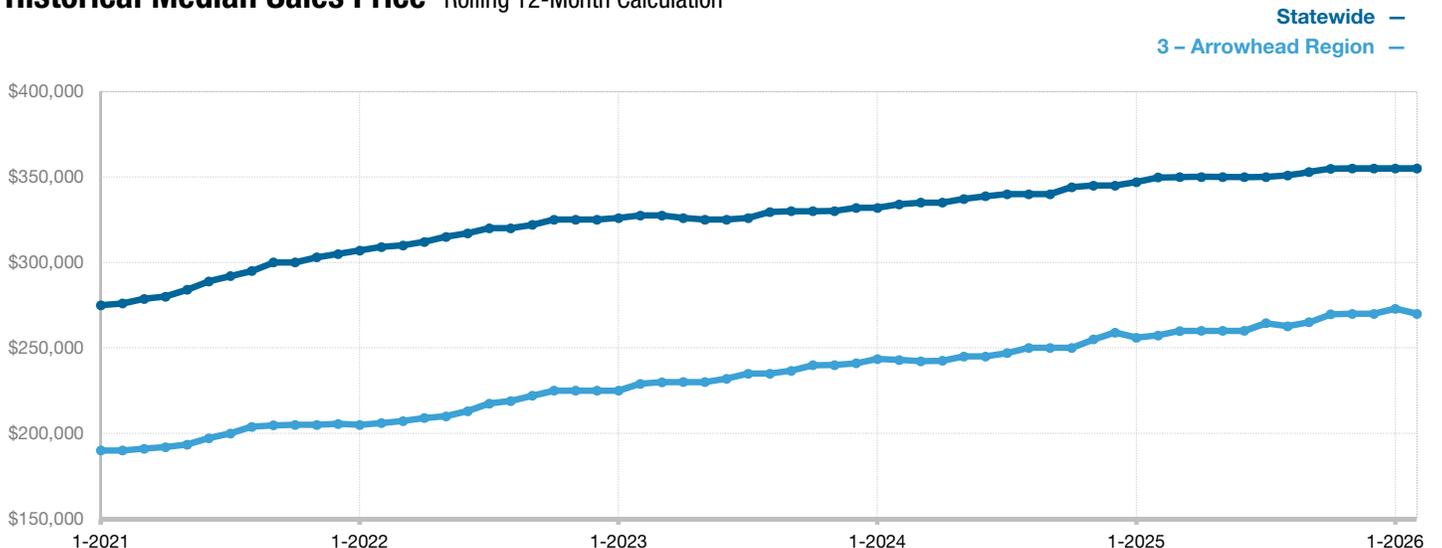
Key Metrics	February			Year to Date		
	2025	2026	Percent Change	Thru 2-2025	Thru 2-2026	Percent Change
New Listings	259	227	- 12.4%	512	448	- 12.5%
Pending Sales	221	147	- 33.5%	405	331	- 18.3%
Closed Sales	166	177	+ 6.6%	362	359	- 0.8%
Median Sales Price*	\$235,500	\$213,500	- 9.3%	\$224,250	\$226,000	+ 0.8%
Percent of Original List Price Received*	94.8%	94.0%	- 0.8%	94.0%	94.4%	+ 0.4%
Days on Market Until Sale	75	77	+ 2.7%	65	70	+ 7.7%
Months Supply of Inventory	2.8	3.0	+ 7.1%	--	--	--

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February



Historical Median Sales Price Rolling 12-Month Calculation



Local Market Update for February 2026

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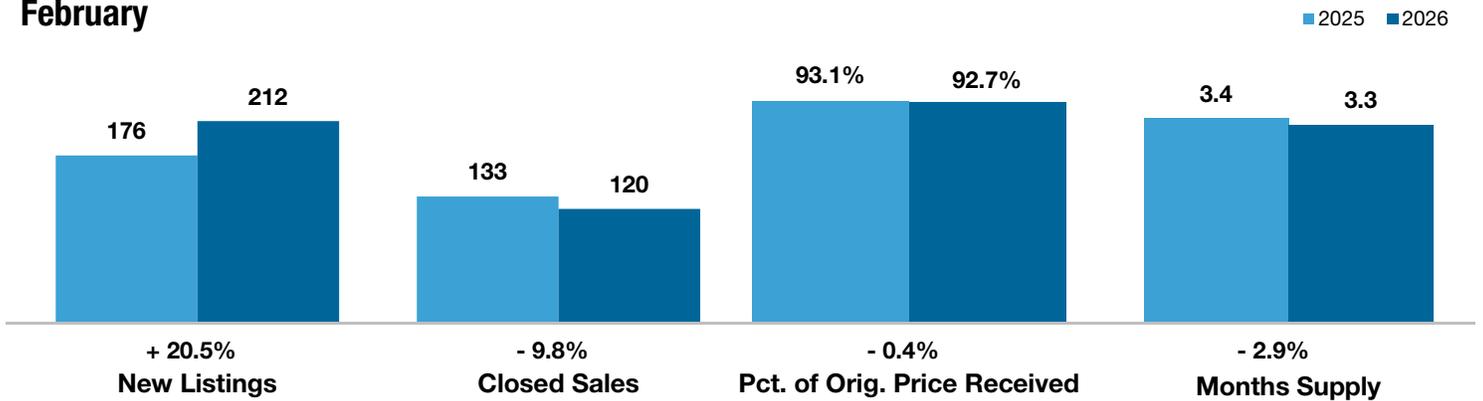


4 – West Central Region

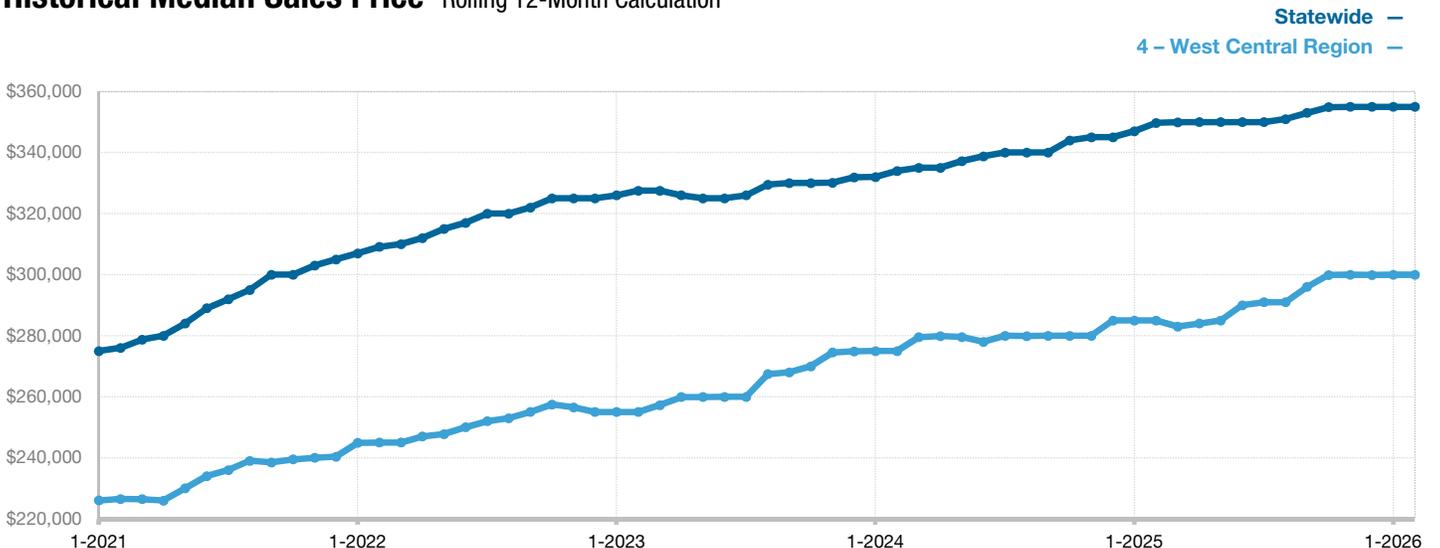
Key Metrics	February			Year to Date		
	2025	2026	Percent Change	Thru 2-2025	Thru 2-2026	Percent Change
New Listings	176	212	+ 20.5%	355	404	+ 13.8%
Pending Sales	139	163	+ 17.3%	274	298	+ 8.8%
Closed Sales	133	120	- 9.8%	251	245	- 2.4%
Median Sales Price*	\$260,000	\$260,000	0.0%	\$259,388	\$272,250	+ 5.0%
Percent of Original List Price Received*	93.1%	92.7%	- 0.4%	93.5%	93.5%	0.0%
Days on Market Until Sale	88	90	+ 2.3%	84	83	- 1.2%
Months Supply of Inventory	3.4	3.3	- 2.9%	--	--	--

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February



Historical Median Sales Price Rolling 12-Month Calculation



Local Market Update for February 2026

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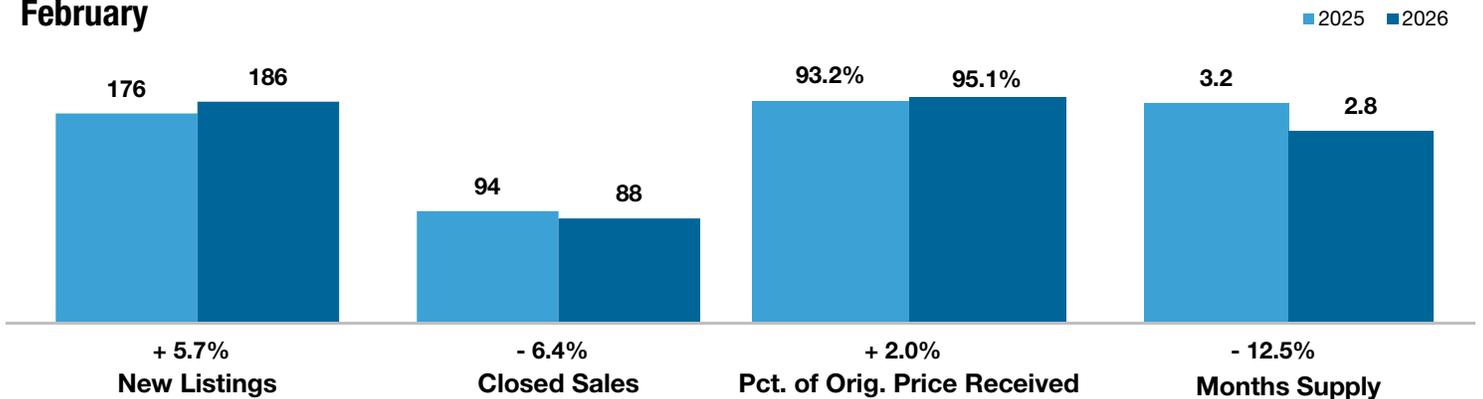


5 – North Central Region

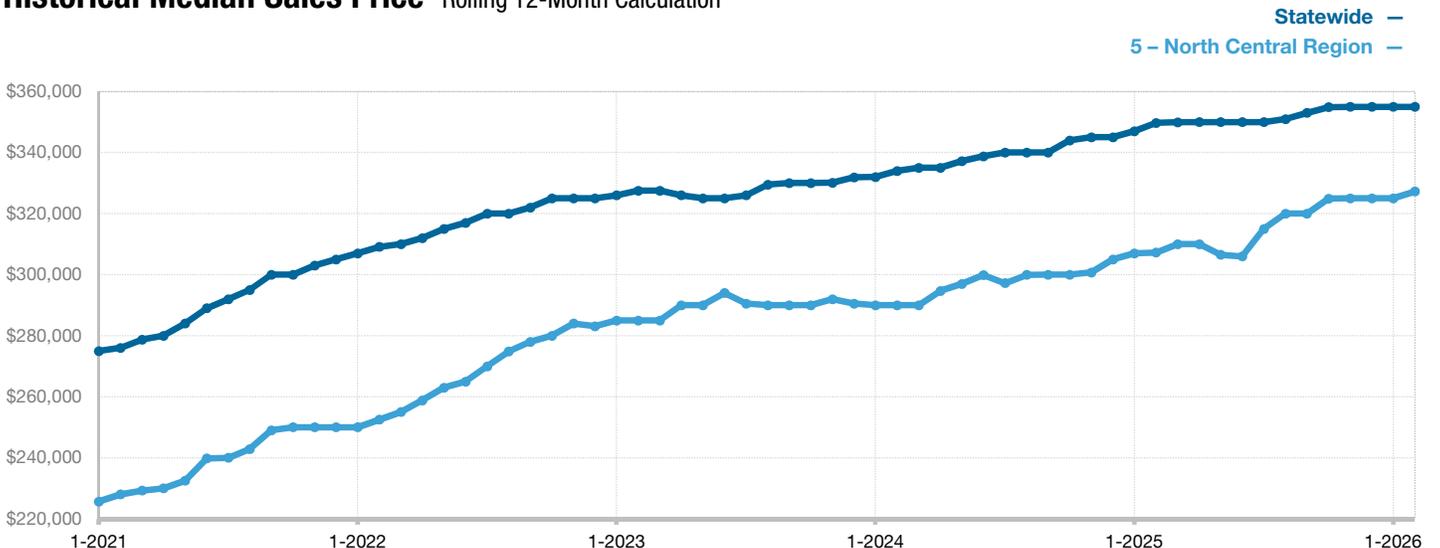
Key Metrics	February			Year to Date		
	2025	2026	Percent Change	Thru 2-2025	Thru 2-2026	Percent Change
New Listings	176	186	+ 5.7%	310	307	- 1.0%
Pending Sales	107	140	+ 30.8%	219	229	+ 4.6%
Closed Sales	94	88	- 6.4%	208	182	- 12.5%
Median Sales Price*	\$275,000	\$285,000	+ 3.6%	\$285,000	\$285,900	+ 0.3%
Percent of Original List Price Received*	93.2%	95.1%	+ 2.0%	94.1%	94.8%	+ 0.7%
Days on Market Until Sale	72	79	+ 9.7%	66	75	+ 13.6%
Months Supply of Inventory	3.2	2.8	- 12.5%	--	--	--

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February



Historical Median Sales Price Rolling 12-Month Calculation



Local Market Update for February 2026

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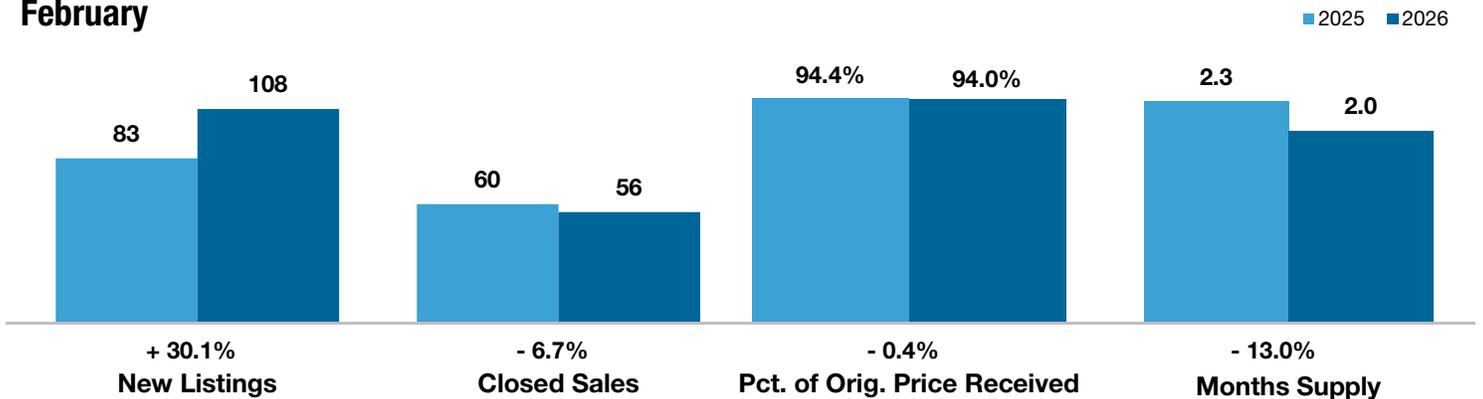


6E – Southwest Central Region

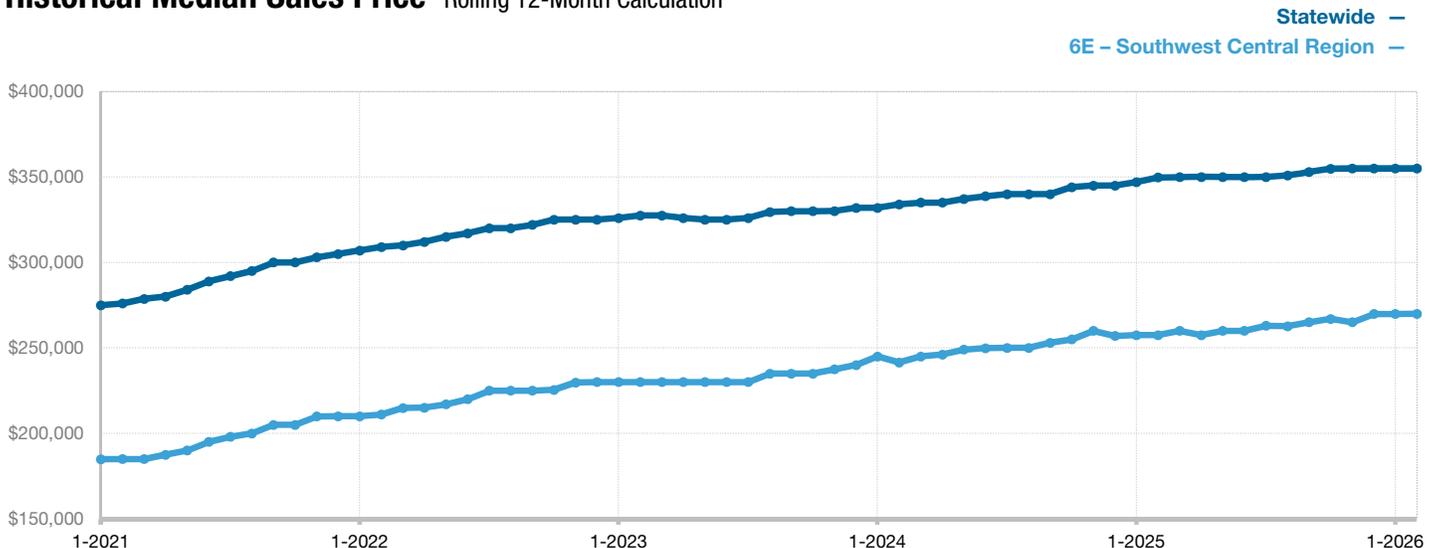
Key Metrics	February			Year to Date		
	2025	2026	Percent Change	Thru 2-2025	Thru 2-2026	Percent Change
New Listings	83	108	+ 30.1%	162	167	+ 3.1%
Pending Sales	70	74	+ 5.7%	136	129	- 5.1%
Closed Sales	60	56	- 6.7%	131	110	- 16.0%
Median Sales Price*	\$223,500	\$242,000	+ 8.3%	\$240,000	\$249,850	+ 4.1%
Percent of Original List Price Received*	94.4%	94.0%	- 0.4%	94.1%	94.5%	+ 0.4%
Days on Market Until Sale	68	67	- 1.5%	64	64	0.0%
Months Supply of Inventory	2.3	2.0	- 13.0%	--	--	--

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February



Historical Median Sales Price Rolling 12-Month Calculation



Local Market Update for February 2026

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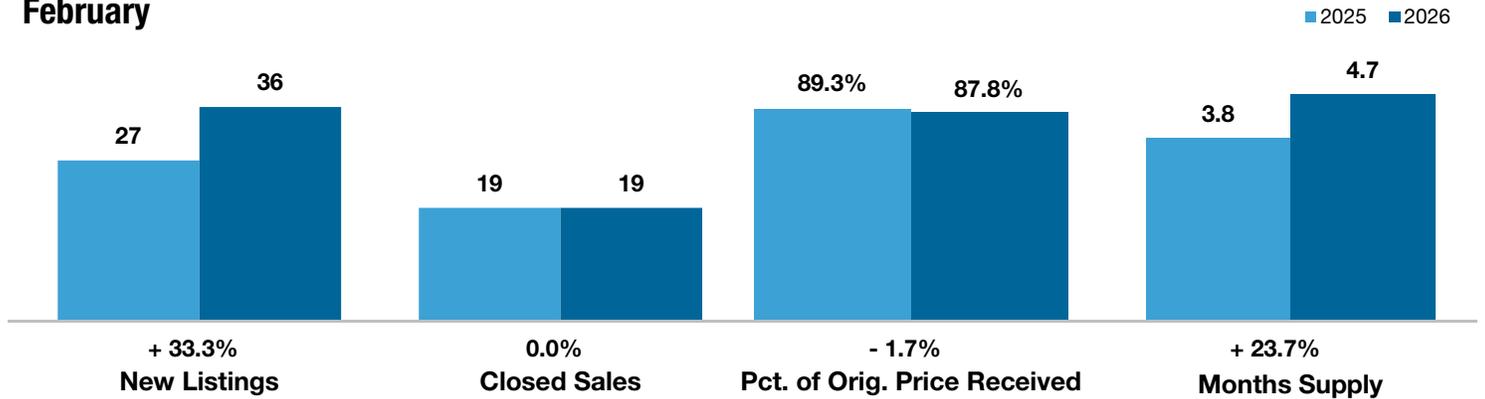


6W – Upper Minnesota Valley Region

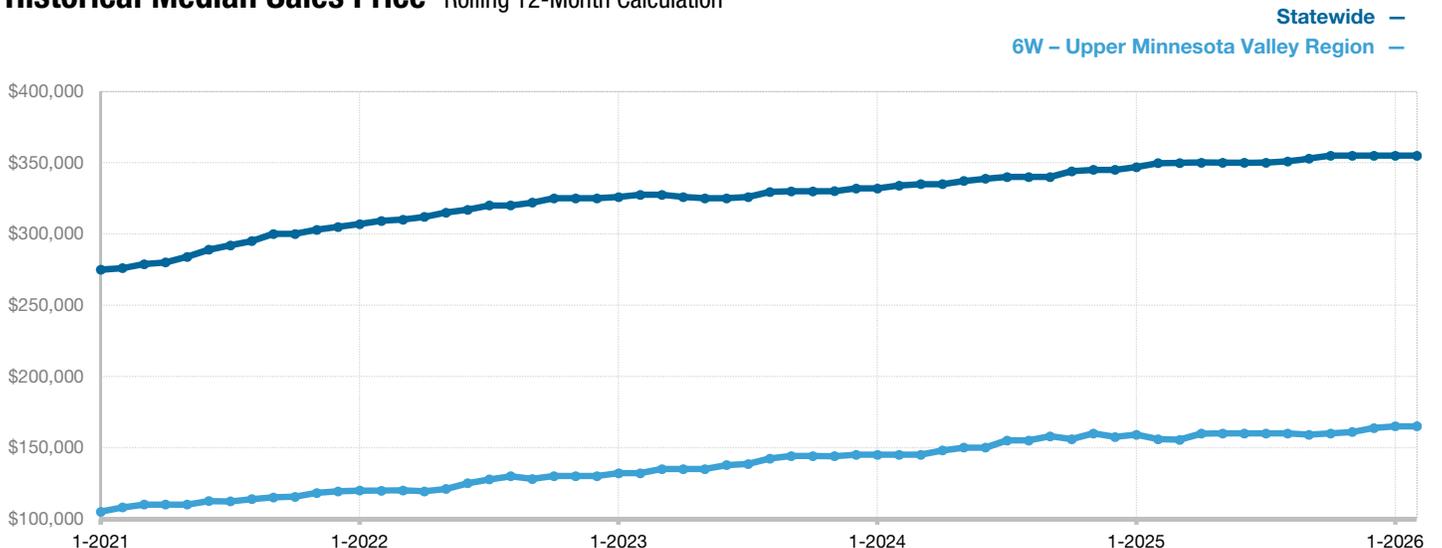
Key Metrics	February			Year to Date		
	2025	2026	Percent Change	Thru 2-2025	Thru 2-2026	Percent Change
New Listings	27	36	+ 33.3%	57	69	+ 21.1%
Pending Sales	21	24	+ 14.3%	45	41	- 8.9%
Closed Sales	19	19	0.0%	41	34	- 17.1%
Median Sales Price*	\$120,000	\$165,000	+ 37.5%	\$139,000	\$166,000	+ 19.4%
Percent of Original List Price Received*	89.3%	87.8%	- 1.7%	89.9%	88.1%	- 2.0%
Days on Market Until Sale	86	132	+ 53.5%	74	128	+ 73.0%
Months Supply of Inventory	3.8	4.7	+ 23.7%	--	--	--

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February



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Local Market Update for February 2026

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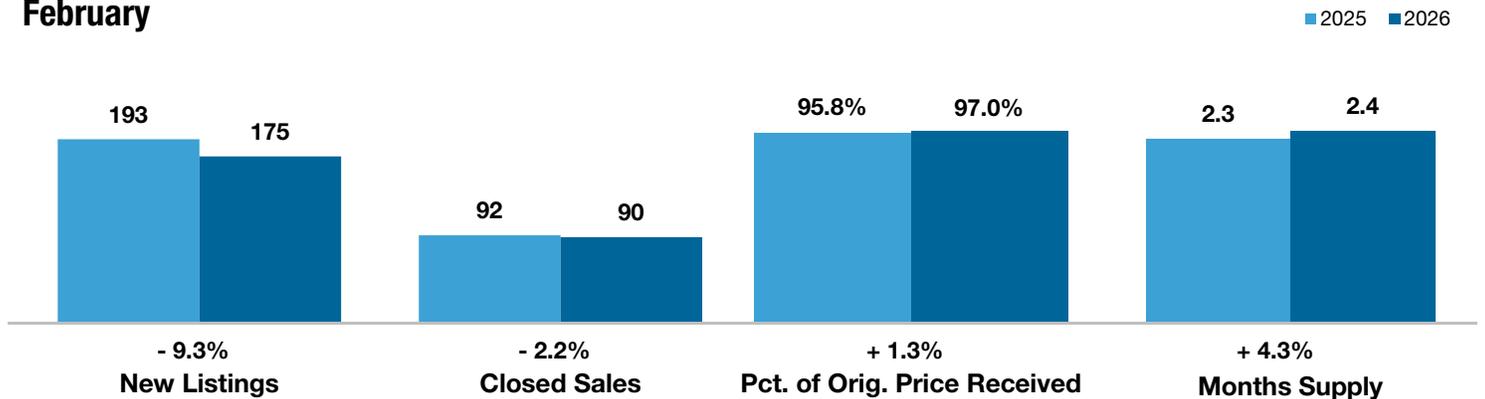


7E – East Central Region

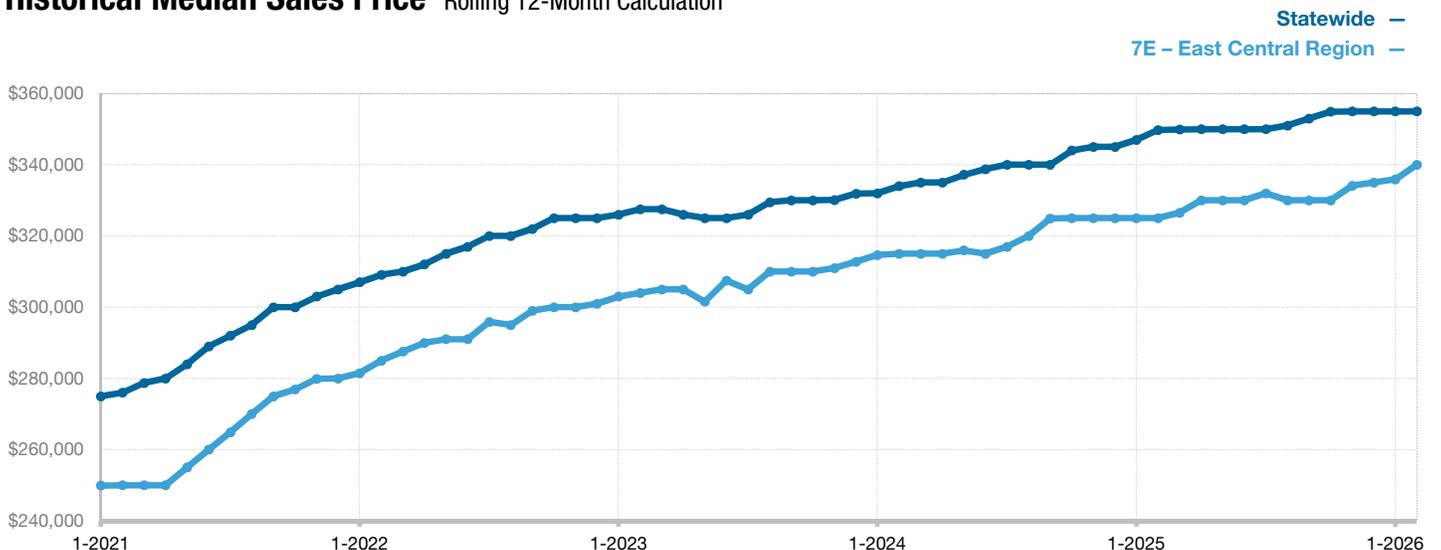
Key Metrics	February			Year to Date		
	2025	2026	Percent Change	Thru 2-2025	Thru 2-2026	Percent Change
New Listings	193	175	- 9.3%	376	352	- 6.4%
Pending Sales	128	132	+ 3.1%	251	241	- 4.0%
Closed Sales	92	90	- 2.2%	215	196	- 8.8%
Median Sales Price*	\$322,000	\$349,000	+ 8.4%	\$310,300	\$330,000	+ 6.3%
Percent of Original List Price Received*	95.8%	97.0%	+ 1.3%	95.8%	95.9%	+ 0.1%
Days on Market Until Sale	71	57	- 19.7%	64	56	- 12.5%
Months Supply of Inventory	2.3	2.4	+ 4.3%	--	--	--

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February



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Local Market Update for February 2026

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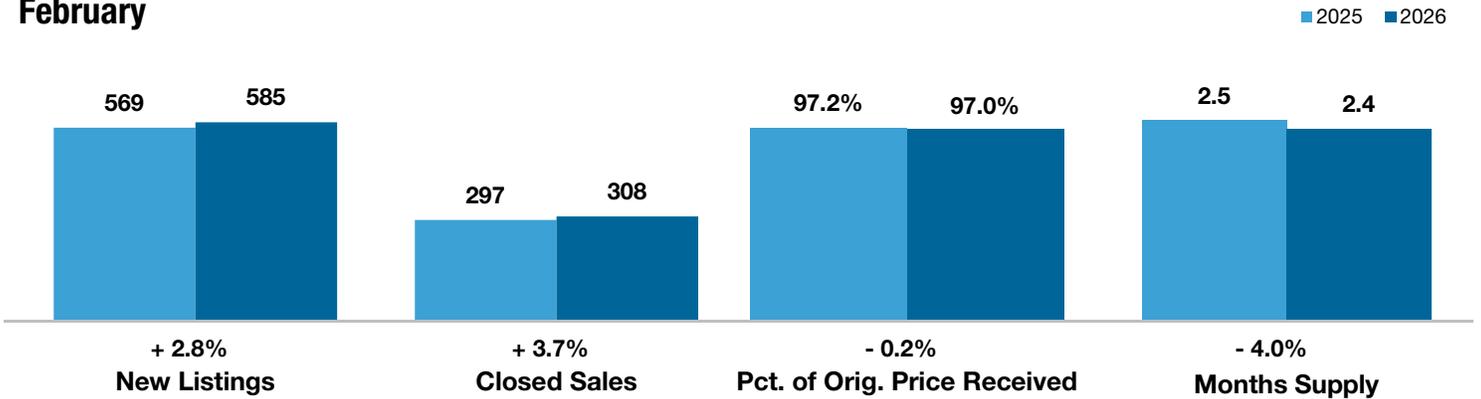


7W – Central Region

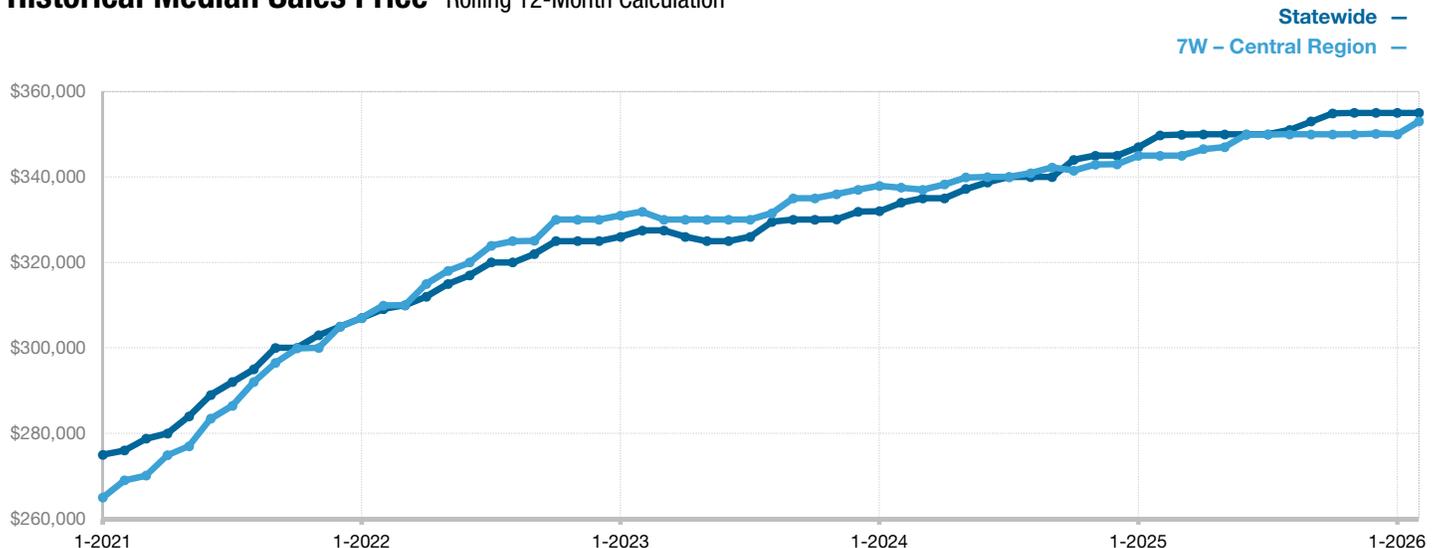
Key Metrics	February			Year to Date		
	2025	2026	Percent Change	Thru 2-2025	Thru 2-2026	Percent Change
New Listings	569	585	+ 2.8%	1,141	1,134	- 0.6%
Pending Sales	357	362	+ 1.4%	679	681	+ 0.3%
Closed Sales	297	308	+ 3.7%	585	568	- 2.9%
Median Sales Price*	\$339,500	\$353,250	+ 4.1%	\$339,900	\$340,000	+ 0.0%
Percent of Original List Price Received*	97.2%	97.0%	- 0.2%	96.9%	96.8%	- 0.1%
Days on Market Until Sale	61	61	0.0%	57	58	+ 1.8%
Months Supply of Inventory	2.5	2.4	- 4.0%	--	--	--

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February



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Local Market Update for February 2026

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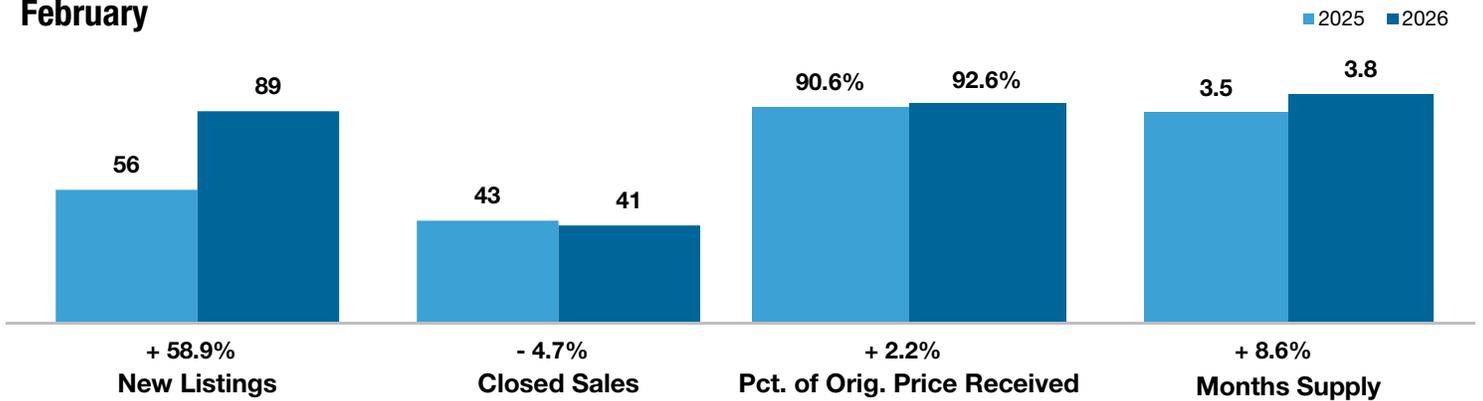


8 – Southwest Region

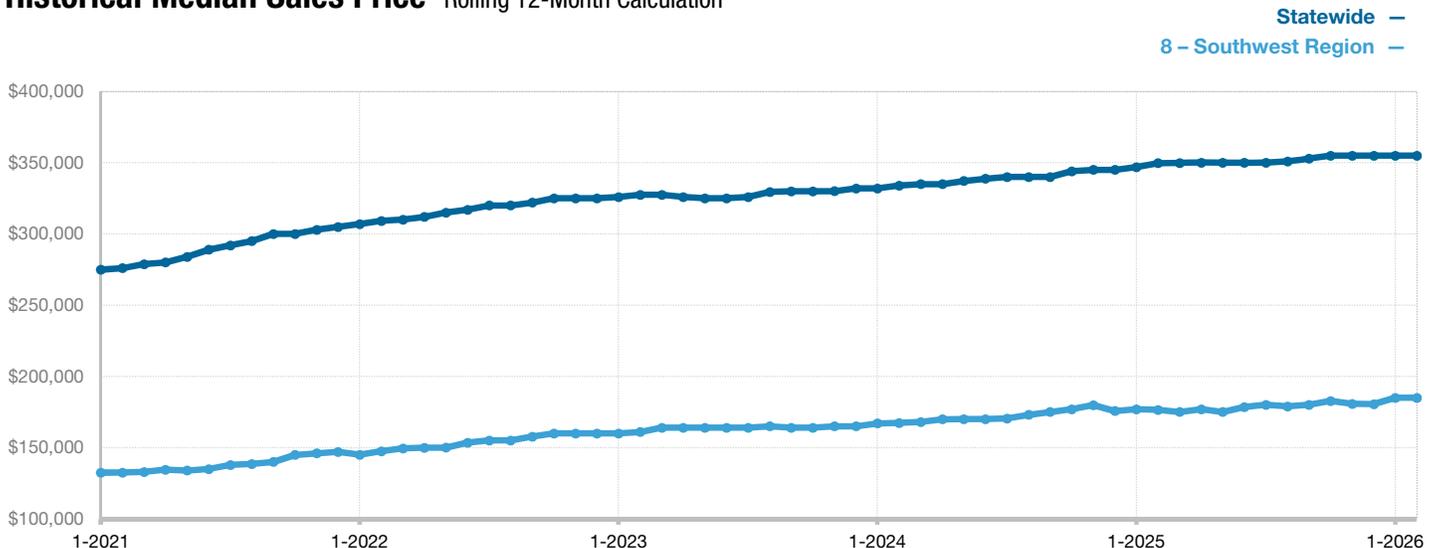
Key Metrics	February			Year to Date		
	2025	2026	Percent Change	Thru 2-2025	Thru 2-2026	Percent Change
New Listings	56	89	+ 58.9%	128	156	+ 21.9%
Pending Sales	55	61	+ 10.9%	110	109	- 0.9%
Closed Sales	43	41	- 4.7%	110	90	- 18.2%
Median Sales Price*	\$155,000	\$182,000	+ 17.4%	\$155,000	\$191,500	+ 23.5%
Percent of Original List Price Received*	90.6%	92.6%	+ 2.2%	92.0%	93.2%	+ 1.3%
Days on Market Until Sale	73	94	+ 28.8%	64	93	+ 45.3%
Months Supply of Inventory	3.5	3.8	+ 8.6%	--	--	--

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February



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Local Market Update for February 2026

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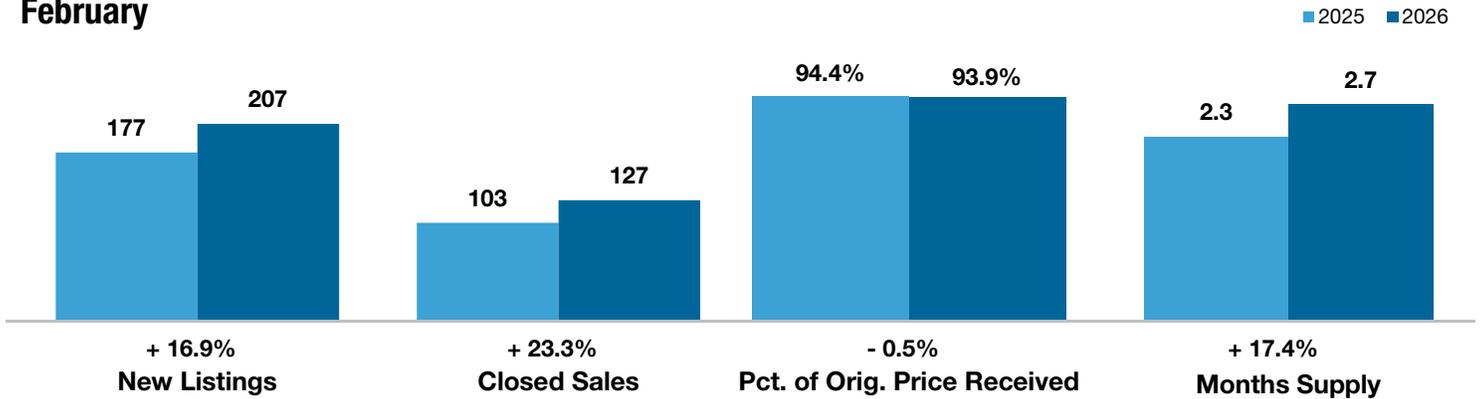


9 – South Central Region

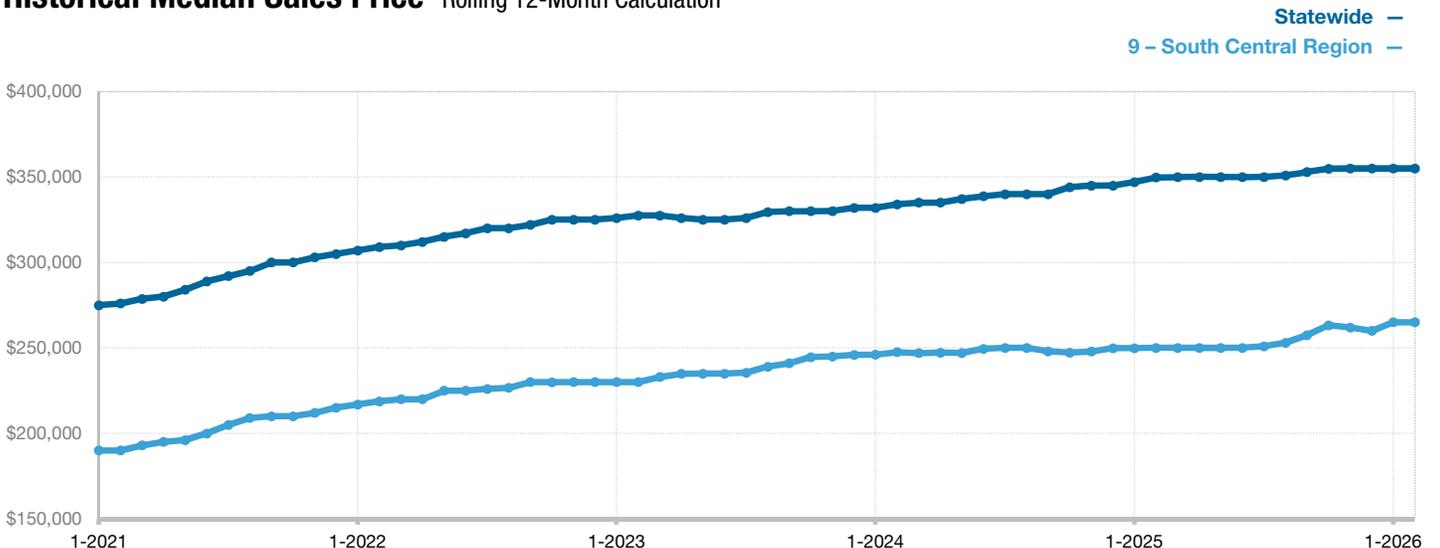
Key Metrics	February			Year to Date		
	2025	2026	Percent Change	Thru 2-2025	Thru 2-2026	Percent Change
New Listings	177	207	+ 16.9%	353	376	+ 6.5%
Pending Sales	153	145	- 5.2%	295	275	- 6.8%
Closed Sales	103	127	+ 23.3%	256	259	+ 1.2%
Median Sales Price*	\$239,900	\$244,000	+ 1.7%	\$230,750	\$250,000	+ 8.3%
Percent of Original List Price Received*	94.4%	93.9%	- 0.5%	93.7%	94.2%	+ 0.5%
Days on Market Until Sale	87	85	- 2.3%	82	85	+ 3.7%
Months Supply of Inventory	2.3	2.7	+ 17.4%	--	--	--

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February



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Local Market Update for February 2026

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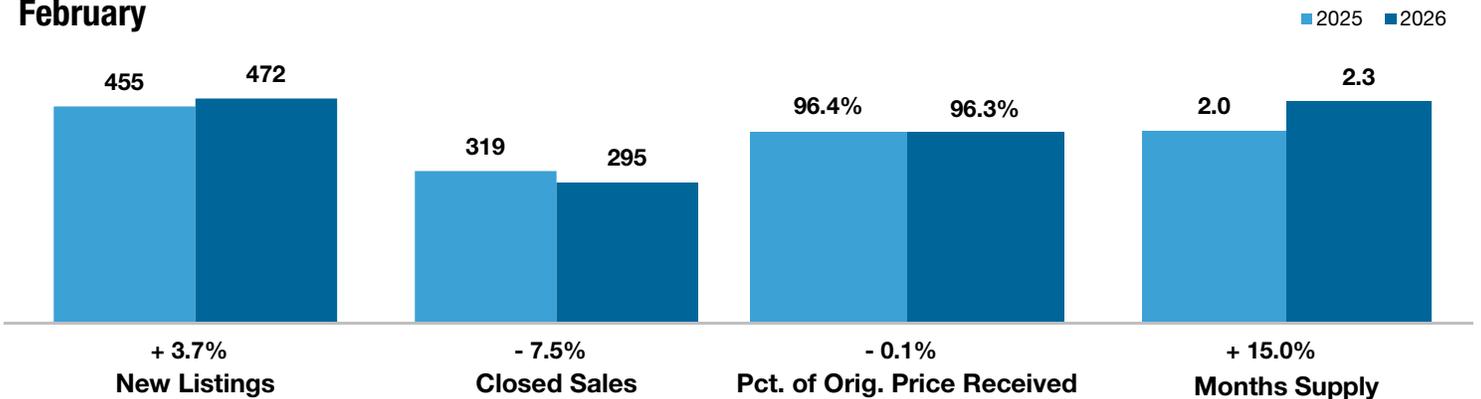


10 – Southeast Region

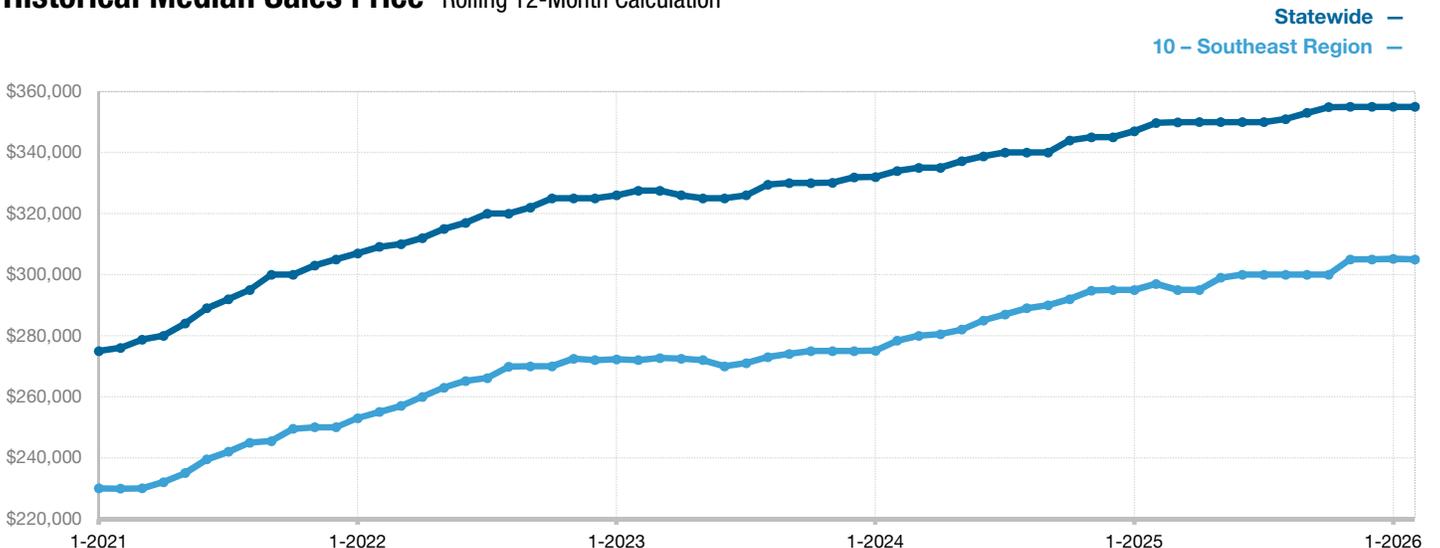
Key Metrics	February			Year to Date		
	2025	2026	Percent Change	Thru 2-2025	Thru 2-2026	Percent Change
New Listings	455	472	+ 3.7%	863	897	+ 3.9%
Pending Sales	412	392	- 4.9%	764	745	- 2.5%
Closed Sales	319	295	- 7.5%	605	594	- 1.8%
Median Sales Price*	\$295,000	\$289,900	- 1.7%	\$286,000	\$290,000	+ 1.4%
Percent of Original List Price Received*	96.4%	96.3%	- 0.1%	96.1%	95.8%	- 0.3%
Days on Market Until Sale	59	68	+ 15.3%	59	69	+ 16.9%
Months Supply of Inventory	2.0	2.3	+ 15.0%	--	--	--

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February



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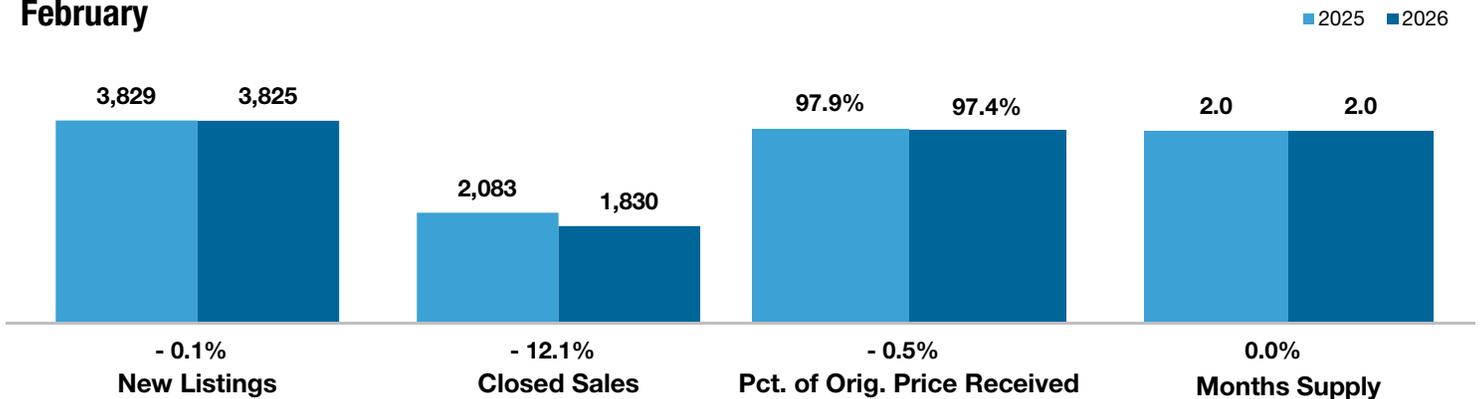


11 – 7-County Twin Cities Region

Key Metrics	February			Year to Date		
	2025	2026	Percent Change	Thru 2-2025	Thru 2-2026	Percent Change
New Listings	3,829	3,825	- 0.1%	7,457	7,094	- 4.9%
Pending Sales	2,604	2,483	- 4.6%	4,797	4,396	- 8.4%
Closed Sales	2,083	1,830	- 12.1%	4,131	3,513	- 15.0%
Median Sales Price*	\$387,350	\$380,000	- 1.9%	\$380,000	\$377,500	- 0.7%
Percent of Original List Price Received*	97.9%	97.4%	- 0.5%	97.4%	97.1%	- 0.3%
Days on Market Until Sale	51	55	+ 7.8%	51	53	+ 3.9%
Months Supply of Inventory	2.0	2.0	0.0%	--	--	--

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February



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