

RESIDENTIAL REAL ESTATE / DATA REPORT

CHAPEL HILL & DURHAM

2026 Market Analysis

MLS EXPORT SNAPSHOT • PREPARED OCTOBER 27, 2026

An evidence-led comparison of recorded home prices, listing activity, marketing time, sale-to-list performance, and price-range supply across the two city labels in your MLS data.

2,779

TOTAL MLS RECORDS

1,854

ACTIVE

305

SOLD RECORDS

347

PENDING / PAB

SOURCE: User-provided Agent Single Line2-2.csv | City-field analysis | No verified transaction-date range



Market Overview

A directional snapshot of the cities as labeled in the supplied MLS export

CHAPEL HILL MEDIAN SOLD

\$638,750

70 sold records

DURHAM MEDIAN SOLD

\$405,000

235 sold records

CHAPEL HILL PREMIUM

57.7%

Relative to Durham median sold price

Key findings

- 01 Price gap

Chapel Hill's median recorded sold price is \$233,750 higher than Durham's, with a similar difference in sold price per finished square foot.
- 02 Marketing time

Durham's sold records show a 14-day median DOM versus 24 days in Chapel Hill. Both cities have substantial active inventory with longer marketing periods.
- 03 Mix matters

The two locations serve different price distributions. Of active listings, 27.2% in Chapel Hill are asking \$1 million or more, compared with 5.1% in Durham.
- 04 What is not measured

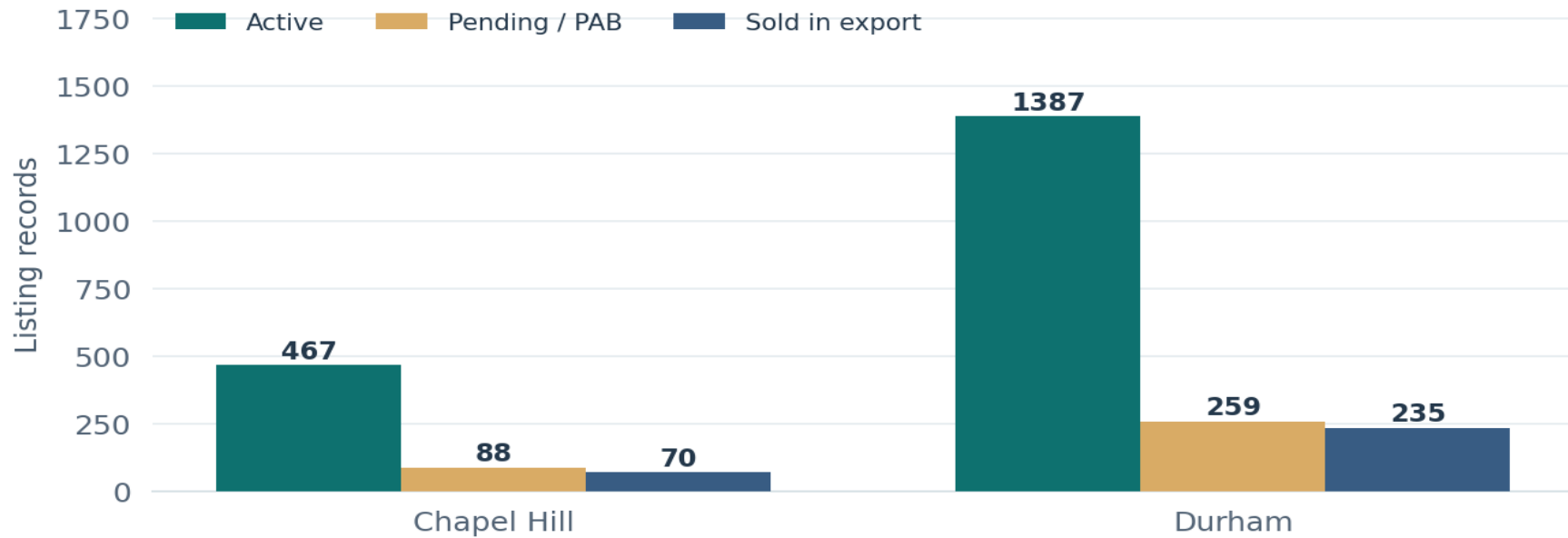
This file does not contain sale dates, listing dates, or a complete 12-month closing series. It cannot establish quarterly trends, year-over-year changes, or defensible months of supply.

How to read this report

"Sold" means records labeled S; "active" means A; "pending" combines P and PAB. Totals represent records in the supplied export, not verified activity during any named month or quarter.

Listing Activity

Status counts across all 2,779 city-labeled records

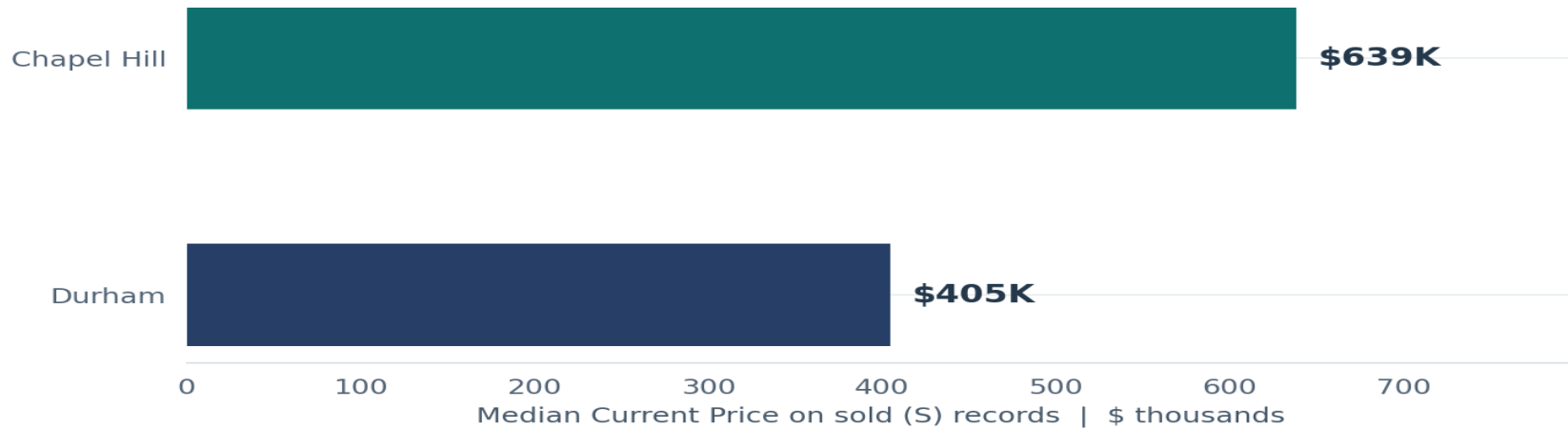


CITY	ACTIVE (A)	PENDING (P+PAB)	SOLD (S)	OTHER STATUS	TOTAL
Chapel Hill	467	88	70	95	720
Durham	1,387	259	235	178	2,059
Combined	1,854	347	305	273	2,779

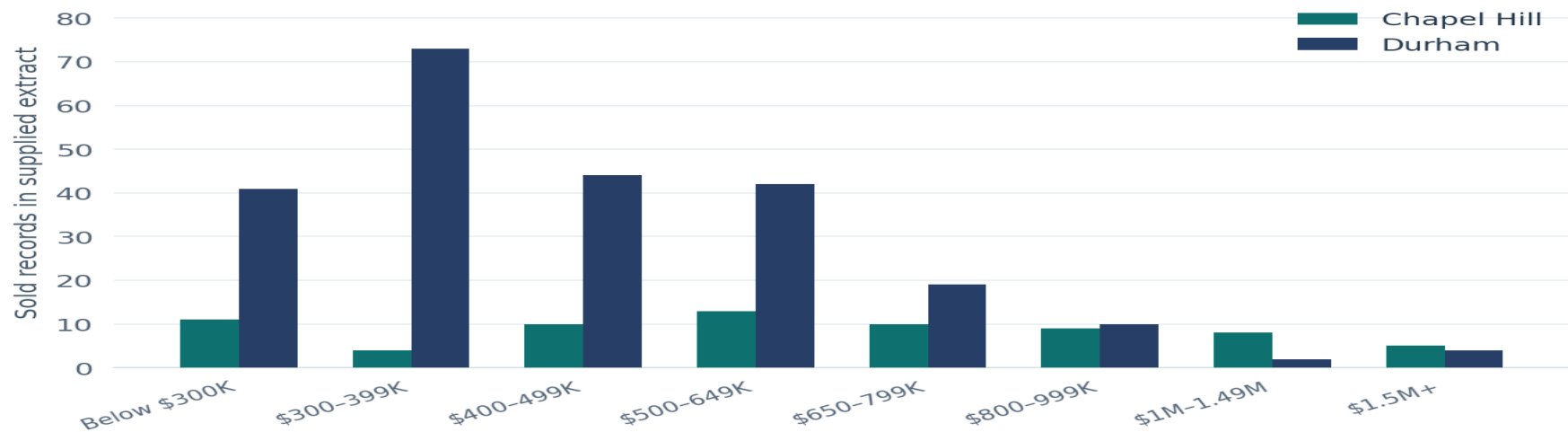
Interpretation: Durham accounts for 74% of the listing records in this extract. Without a defined export time window, sold counts cannot be treated as annual sales volume or used to calculate absorption.

Sales Prices

Sale-price medians and the mix of sold records by price band



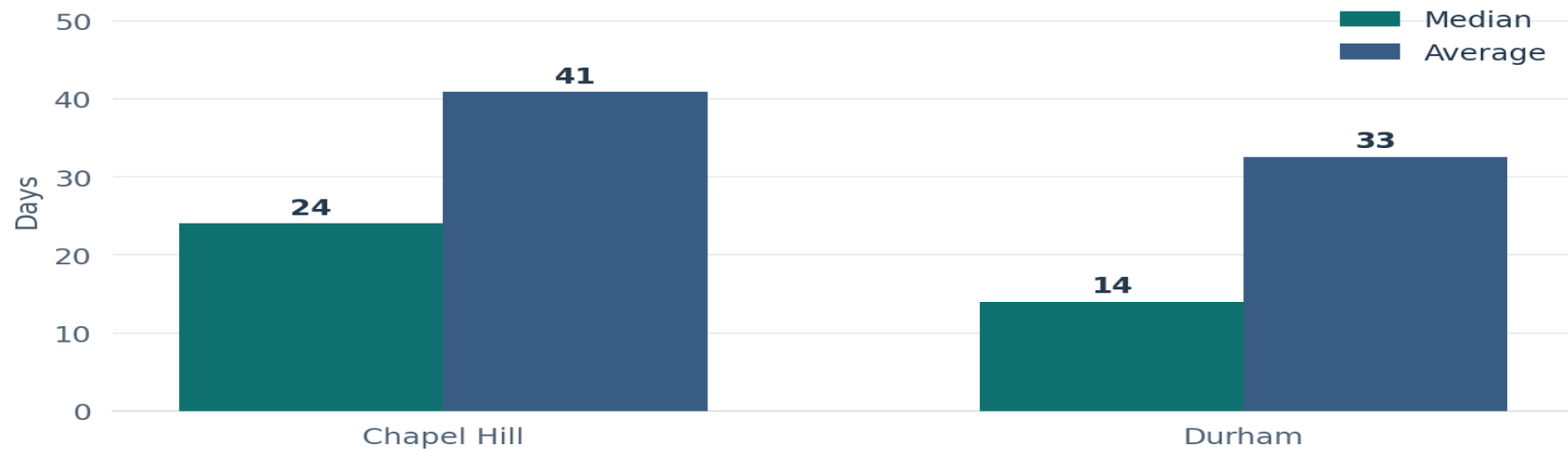
Sold listing distribution



Reading note: "Median sold price" is the median of the Current Price values among records marked S. Different home sizes and product mixes affect citywide medians; they are not repeat-sales appreciation measures.

Days on Market

Median and average DOM reported on sold records



CHAPEL HILL ACTIVE MEDIAN

45 days

121 active records at 90+ days

DURHAM ACTIVE MEDIAN

28 days

270 active records at 90+ days

LONGER-LISTED INVENTORY

391 homes

Combined active records at 90+ days

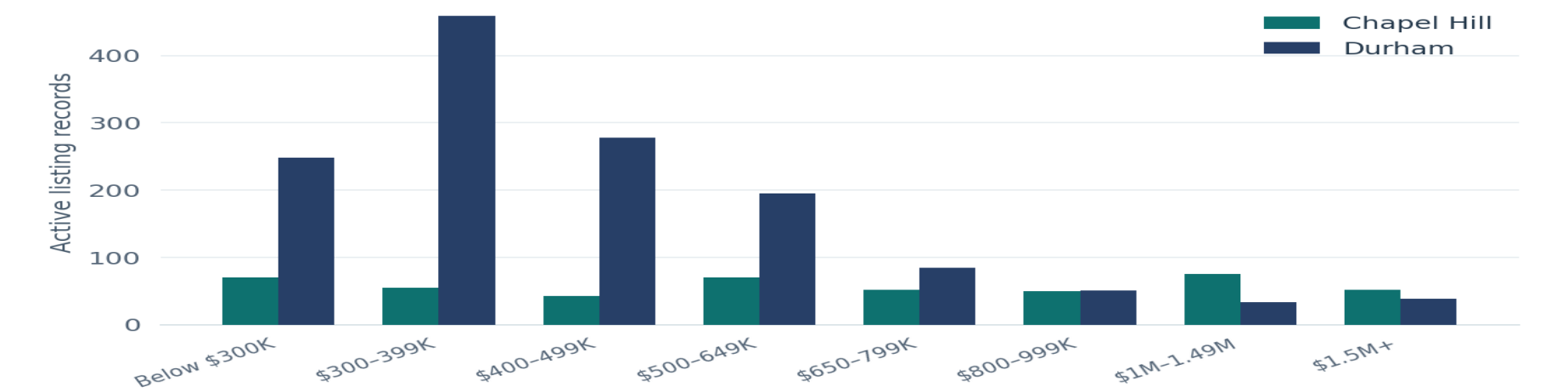
What the DOM figures imply

Durham sold records have a shorter median marketing period, while Chapel Hill active listings show a longer typical exposure. The extract also includes 7 Chapel Hill and 45 Durham sold records at 0 DOM, which can occur in new construction and other listing workflows. Published DOM should be interpreted with those records in mind.



Active Supply by Price

Where the listed homes are concentrated - not a months-of-supply estimate



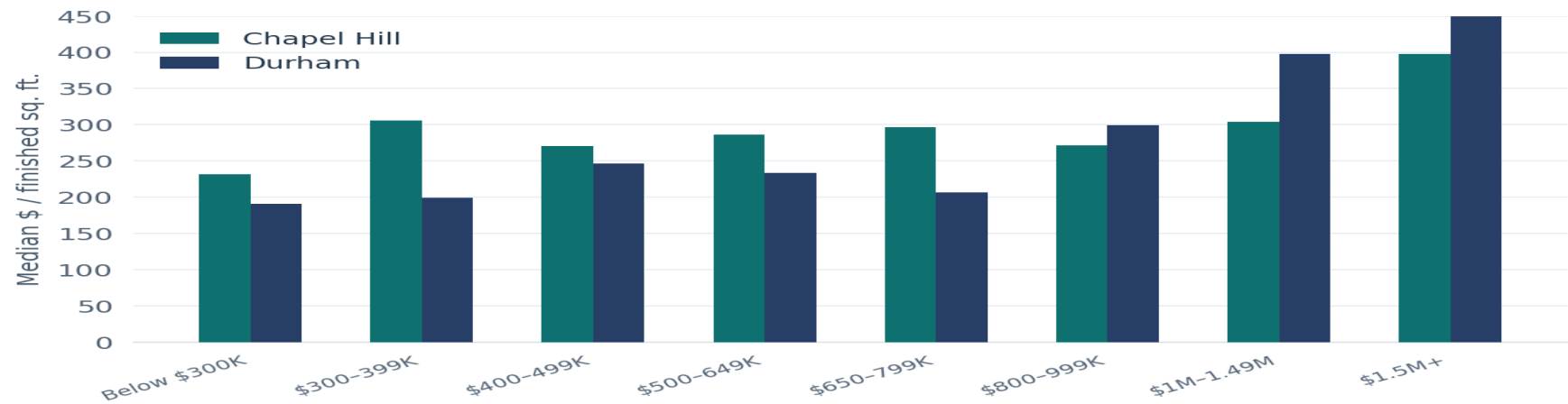
PRICE BAND	CHAPEL HILL ACTIVE	DURHAM ACTIVE	TOTAL ACTIVE
Below \$300K	70	248	318
\$300-399K	55	459	514
\$400-499K	43	278	321
\$500-649K	70	195	265
\$650-799K	52	85	137
\$800-999K	50	51	101
\$1M-1.49M	75	33	108
\$1.5M+	52	38	90
ALL PRICE BANDS	467	1,387	1,854

Important: Mosaic-style months of inventory = active homes divided by the monthly pace of closed sales over a defined prior 12-month period. The sold dates and 12-month sales denominator are missing here, so no months-of-inventory figure is estimated.



Median Price per Square Foot

Calculated from sold records and organized by sale-price tier



SOLD PRICE BAND	CHAPEL HILL \$/SF	N	DURHAM \$/SF	N
Below \$300K	\$232	11	\$191	41
\$300-399K	\$306	4	\$199	73
\$400-499K	\$270	10	\$247	44
\$500-649K	\$287	13	\$233	42
\$650-799K	\$297	10	\$207	19
\$800-999K	\$272	9	\$299	10
\$1M-1.49M	\$304	8	\$398	2
\$1.5M+	\$397	5	\$458	4

The overall median sold \$/sf is \$284.66 in Chapel Hill and \$217.93 in Durham. Use extreme price-band statistics cautiously: some groups contain fewer than ten sales, and property characteristics are not controlled for.



Sale-to-List Performance

Contract pricing on records marked as sold

CHAPEL HILL MEAN SP/LP

97.79%

Median ratio: 98.3%

DURHAM MEAN SP/LP

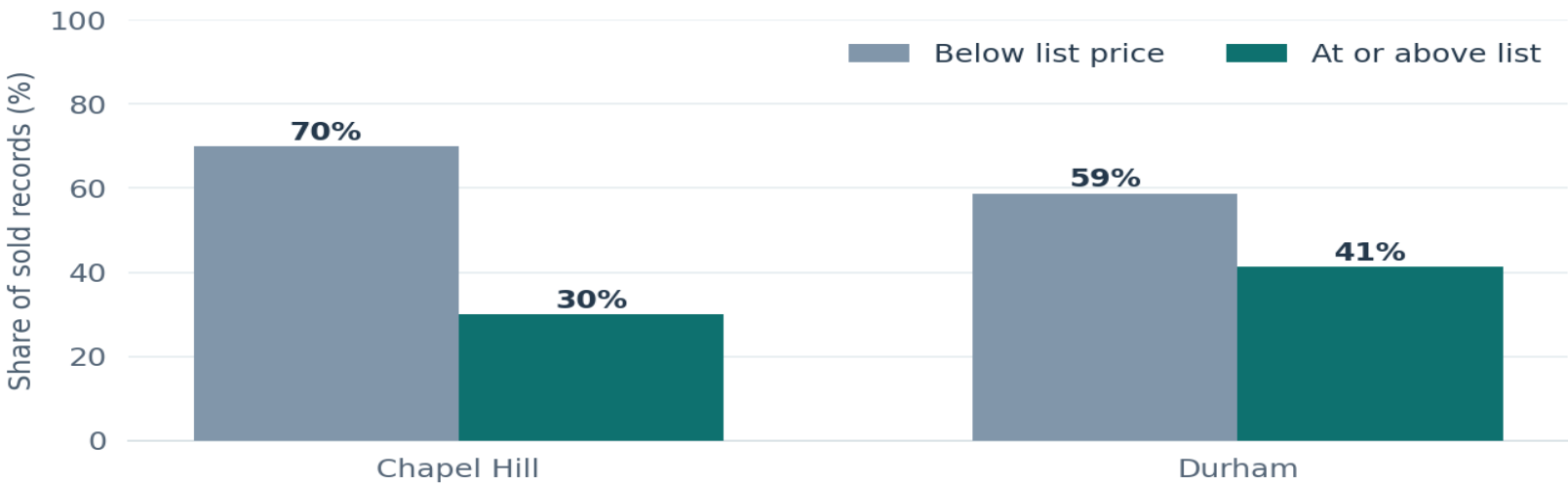
98.34%

Median ratio: 98.9%

AT / ABOVE LISTING

118 sales

21 Chapel Hill + 97 Durham

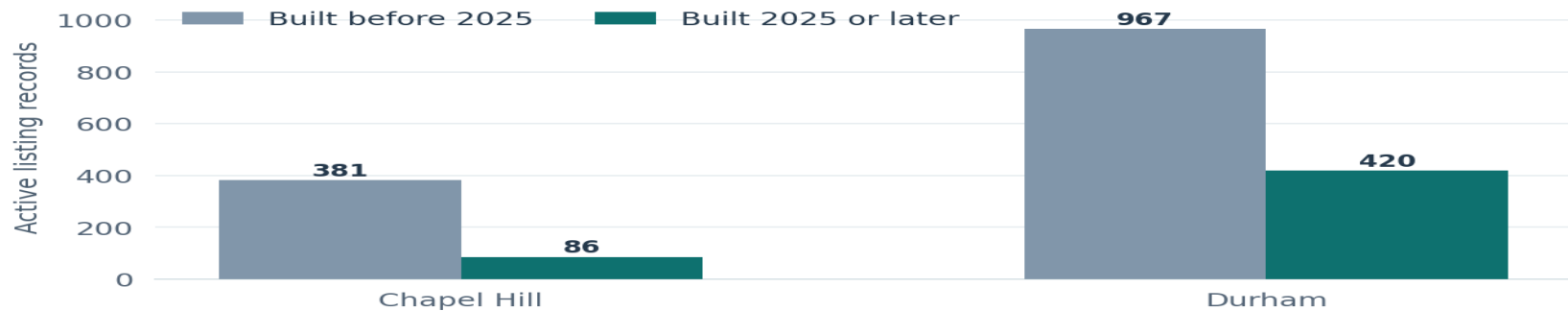


What the ratio means

The source contains an SP/LP value for all 305 sold records; a value of 1.00 means the reported closing price equaled the reported list price. The ratio does not account for concessions, financing incentives, repairs, or changes from original asking price. Concessions are populated on only 173 sold records, so blank cells are not interpreted as zero.

Newer Construction & Geography

Newer-year-built listings and how City differs from County



METRIC	CHAPEL HILL	DURHAM
Active, built 2025 or later	86	420
Share of active inventory	18.4%	30.3%
Sold, built 2025 or later	6	46
Median active asking price - newer	\$802,000	\$439,000

City field vs. county field

CITY LABEL	ORANGE	CHATHAM	DURHAM	WAKE
Chapel Hill	452	207	61	0
Durham	9	10	2,039	1

Scope: Chapel Hill city-labeled listings extend into Chatham and Durham counties. This report follows the supplied City column, which may reflect a mailing-area label rather than a verified municipal boundary. "Built 2025 or later" is only a year-built proxy for newer construction, not a confirmed new-construction property classification.

Conclusions & Methodology

Practical use of these statistics and exact data limitations

Chapel Hill: The supplied sold records support a higher median price and more premium-tier active listings. Sellers face a longer sold-record median DOM, so pricing and property presentation remain important. Buyers can compare individual homes against a wider spread of asking prices above \$800,000.

Durham: The sold sample centers nearer \$405,000, with the largest active concentration in the \$300,000–\$499,999 bands. Typical sold DOM is shorter, but 270 active listings have 90 or more reported market days, indicating meaningful variation within the city.

Data notes & definitions

- Source / scope: Agent Single Line2-2.csv (2,779 MLS records); grouped by the exact City strings Chapel Hill and Durham. The source includes mixed residential property types but no reliable type field.
- Statuses: Active = A; pending = P and PAB; sold = S. Other statuses (X, Cancelled, W, T, CSN) are excluded from active, sold and pending counts.
- Pricing / DOM: Price = Current Price supplied in the export; price per square foot uses CP/SF; DOM uses the reported DOM field. SP/LP is the supplied sold-price/list-price ratio.
- Not available: Closing dates, listing dates, historical comparable exports, verified property type, verified municipal boundaries, and exact MLS pull date. Accordingly, this is not a Q2 or October transaction-period report; no YOY trend, months of inventory, or market appreciation claim is made.
- Data cautions: Each MLS number represents a record, not necessarily a unique home. Some records have zero DOM; a small number are missing size/price-per-foot data. Future year-built dates may be proposed construction.

To produce a full Mosaic-style quarterly report: obtain city-specific sold transactions with close dates for several years and active listing snapshots as of each quarter-end. Those additions enable quarterly sales charts, historical price trends, and genuine months-of-supply tables.