



# OAHU MARKET REPORT

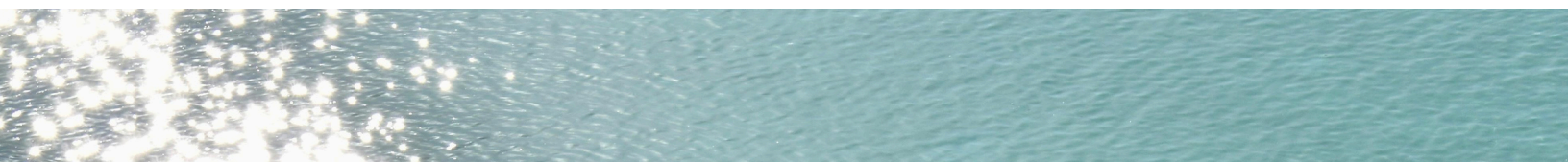
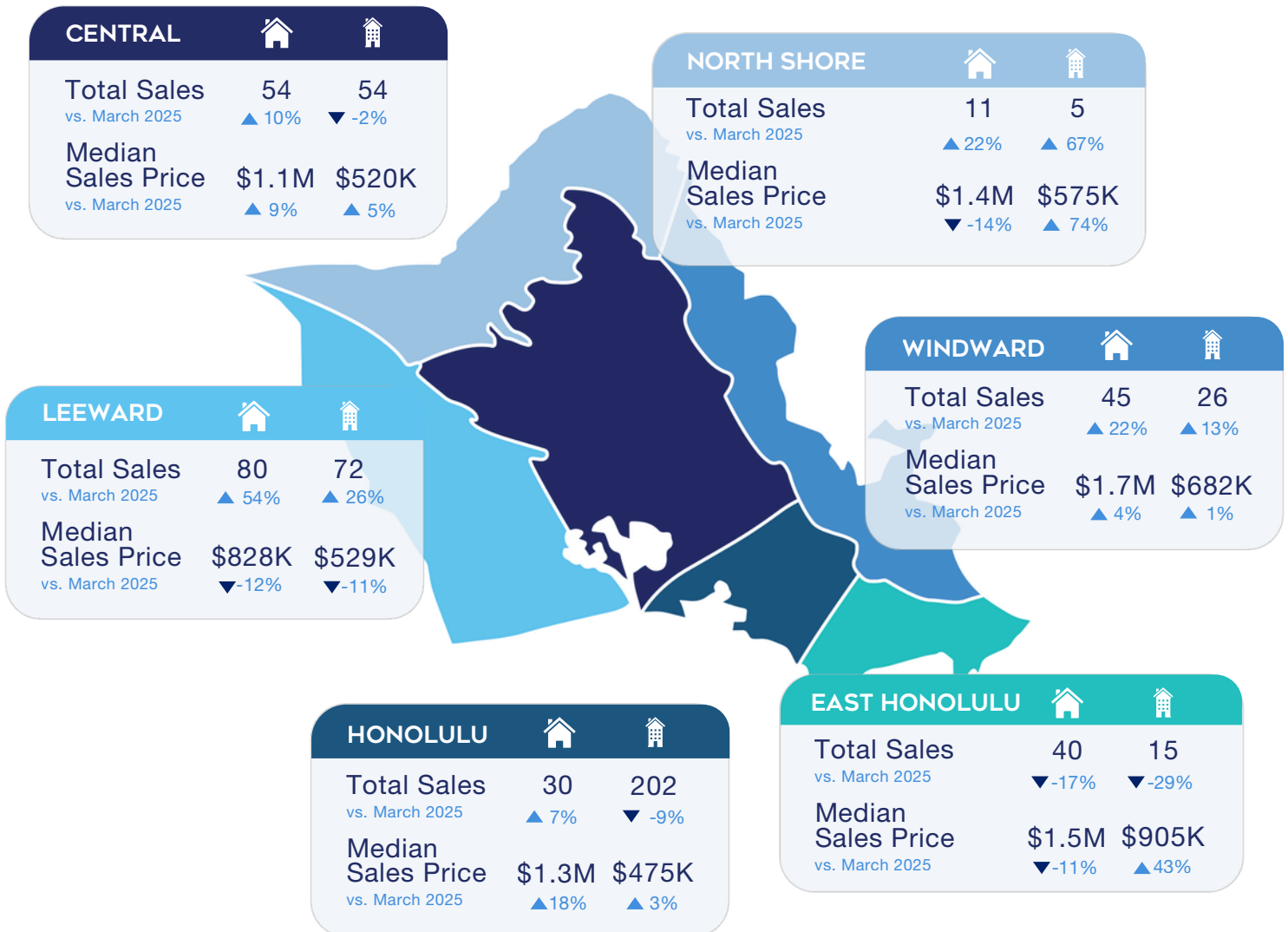
## MARCH 2026

O'ahu's housing market returned to more typical activity levels in March, with both single-family homes and condominiums rebounding from the early-year seasonal slowdown. Single-family home sales rose to 260 transactions (+17% YoY), while condo sales reached 374 (-2% YoY), reflecting improving momentum month over month. Median pricing remained steady, with the single-family median at \$1,200,000 (+4% YoY) and the condo median at \$520,500 (+3% YoY). At the same time, new listings declined across both segments (-15% SFH, -17% condos YoY), pointing to tightening inventory as the market looks ahead toward peak summer season.

### ISLAND-WIDE OVERVIEW

	TOTAL SALES	MEDIAN SOLD PRICE	% LIST PRICE RECEIVED	SOLD ABOVE LIST PRICE	MEDIAN DAYS ON MARKET	NEW LISTINGS
SINGLE-FAMILY HOMES	260	\$1,200,000	98%	26%	18	342
CONDOMINIUMS	374	\$520,500	98%	15%	42	695

### ISLAND-WIDE OVERVIEW



# SINGLE-FAMILY HOME TRANSACTIONS

## MARCH 2026 VS. PERCENT CHANGE OVER LAST YEAR

Single-family home sales rebounded to 260 transactions (+17% YoY), reflecting renewed buyer activity following the slower start to the year. The median price held at \$1,200,000 (+4% YoY), reinforcing continued pricing stability. Median days on market increased slightly to 18 days (+13% YoY), indicating a measured pace, though homes are still selling relatively quickly overall. Activity remained relatively balanced across the island, with gains in more attainable submarkets such as Ewa Beach (+150% YoY) and Waianae (+140% YoY) alongside continued strength in lifestyle-driven areas like Kailua, reinforcing broad-based demand rather than a shift concentrated in any single region.



		TOTAL SALES	MEDIAN SOLD PRICE	% LIST PRICE RECEIVED	MEDIAN DOM	SOLD ABOVE LIST PRICE	LIVING \$/SQ FT
CENTRAL	Aiea	11 ▲ 22%	\$1,315,000 ▲ 21%	96% ▼ -3%	12 ▼ -8%	9% ▼ -73%	\$630 ▼ -7%
	Honolulu	3 ▲ 200%	\$1,125,000 ▲ 29%	99% ▲ 2%	8 ▼ -83%	33% —	\$491 ▼ -52%
	Mililani	11 ▼ -15%	\$1,150,000 ▼ -1%	102% ▲ 3%	16 ▼ -27%	64% ▲ 107%	\$651 ▼ -1%
	Pearl City	8 ▼ -11%	\$1,039,411 ▲ 9%	100% ▲ 0%	16 ▼ -3%	38% ▲ 13%	\$574 ▼ -13%
	Wahiawa	6 ▲ 20%	\$722,500 ▼ -12%	97% ▼ -3%	34 ▼ -11%	33% ▲ 67%	\$586 ▼ -13%
	Waipahu	15 ▲ 25%	\$947,500 ▼ -9%	98% ▼ -1%	20 ▼ -11%	20% ▼ -20%	\$600 ▲ 4%
NORTH SHORE	Haleiwa	4 — 0%	\$1,837,500 ▼ -18%	95% ▼ -2%	55 ▲ 378%	0% —	\$1,302 ▲ 2%
	Laie	3 ▲ 200%	\$1,400,000 ▲ 41%	89% ▼ 11%	85 ▲ 227%	0% —	\$749 ▲ 30%
	Waialua	4 ▲ 33%	\$1,282,500 ▼ -21%	92% ▼ -7%	153 ▲ 96%	0% ▼ -100%	\$1,109 ▲ 21%
EAST HONOLULU	Honolulu	40 ▼ -17%	\$1,492,500 ▼ -11%	98% ▼ -2%	16 — 0%	30% ▼ -15%	\$835 ▼ -42%
HONOLULU	Honolulu	30 ▲ 11%	\$1,355,000 ▲ 18%	101% ▲ 2%	20 ▲ 63%	33% — 0%	\$737 ▲ 8%
LEEWARD	Ewa Beach	40 ▲ 150%	\$945,000 ▲ 0%	100% ▼ 0%	15 ▼ -62%	15% ▼ -60%	\$613 ▼ -5%
	Kapolei	16 ▼ -38%	\$927,500 ▼ -12%	99% ▲ 0%	24 ▲ 26%	25% ▼ -7%	\$605 ▼ -3%
	Waianae	24 ▲ 140%	\$598,750 ▼ -1%	99% ▲ 3%	32 ▼ -45%	33% ▲ 233%	\$487 ▲ 16%
WINDWARD	Kailua	28 ▲ 40%	\$1,832,500 ▼ -6%	97% ▼ -3%	23 ▲ 50%	21% ▲ 7%	\$1,163 ▼ -5%
	Kaneohe	16 ▲ 14%	\$1,350,000 — 0%	96% ▼ -4%	10 ▼ -29%	25% ▼ -30%	\$659 ▼ -12%
	Waimanalo	1 — 0%	\$765,000 ▼ -13%	102% ▲ 5%	5 ▼ -17%	100% —	\$498 ▼ -32%
GRAND TOTAL		260 ▲ 19%	\$1,200,000 ▲ 4%	98% ▼ -1%	18 ▲ 13%	26% ▼ -11%	\$752 ▼ -21%

# CONDOMINIUM TRANSACTIONS

## MARCH 2026 VS. PERCENT CHANGE OVER LAST YEAR

The condo market also saw improved activity, as the median condo price rose to \$520,500 (+3% YoY), continuing a trend of steady pricing. With 374 sales (-2% YoY), buyer engagement picked up from earlier in the year even as median days on market increased modestly to 42 days (+6% YoY), suggesting buyers are taking slightly more time, though well-priced units continue to move.

		TOTAL SALES	MEDIAN SOLD PRICE	% LIST PRICE RECEIVED	MEDIAN DOM	LIST PRICE	LIVING \$/SQ FT
CENTRAL	Aiea	8 ▼ -38%	\$600,000 ▲ 49%	99% ▼ -1%	28 ▼ -42%	13% ▼ -68%	\$527 ▲ 5%
	Honolulu	2 ▲ 100%	\$507,500 ▲ 22%	97% ▼ -7%	110 ▲ 38%	0% ▼ -100%	\$501 ▼ -34%
	Mililani	22 ▲ 22%	\$564,950 ▲ 18%	98% ▼ -3%	54 ▲ 95%	23% ▼ -59%	\$568 ▼ -2%
	Pearl City	7 ▼ -36%	\$420,000 ▼ -15%	99% ▲ 0%	67 ▲ 91%	14% ▼ -21%	\$549 ▼ -4%
	Wahiawa	3 ▲ 50%	\$373,500 ▲ 51%	101% ▲ 5%	3 ▼ -85%	67% —	\$472 ▲ 49%
	Waipahu	12 ▲ 20%	\$482,000 ▼ -5%	98% ▼ 0%	55 ▲ 76%	33% ▲ 233%	\$559 ▼ -21%
NORTH SHORE	Kahuku	1 —	\$1,150,000 —	105% —	6 —	100% —	\$1,558 —
	Waialua	4 ▲ 33%	\$529,000 ▲ 60%	99% ▲ 4%	47 ▲ 68%	25% —	\$785 ▲ 0%
EAST HONOLULU	Honolulu	15 ▼ -29%	\$905,000 ▲ 43%	97% ▼ -1%	26 ▼ -30%	7% ▼ -53%	\$859 ▼ -2%
HONOLULU	Honolulu	202 ▼ -9%	\$475,000 ▲ 3%	97% ▲ 0%	50 ▼ -12%	9% ▲ 31%	\$821 ▼ -3%
LEEWARD	Ewa Beach	18 ▼ -28%	\$515,000 ▼ -20%	100% ▼ -1%	18 ▼ -44%	33% ▲ 39%	\$595 ▲ 4%
	Kapolei	41 ▲ 95%	\$653,645 ▼ -1%	98% ▼ -1%	29 ▲ 21%	15% ▼ -23%	\$595 ▼ -7%
	Waianae	13 ▲ 18%	\$295,000 ▲ 35%	97% ▼ -1%	22 ▼ -29%	15% ▼ -15%	\$356 ▲ 19%
WINDWARD	Hauula	3 ▲ 200%	\$215,000 ▲ 8%	97% ▲ 0%	42 ▲ 35%	0% —	\$613 ▲ 46%
	Kaaawa	1 ▼ -50%	\$300,000 ▼ -21%	92% ▼ 0%	0 ▼ -100%	0% —	\$787 ▲ 32%
	Kailua	7 ▼ -30%	\$755,000 ▲ 1%	99% ▲ 1%	74 ▲ 377%	14% ▼ -29%	\$854 ▲ 12%
	Kaneohe	15 ▲ 50%	\$695,000 ▲ 3%	99% ▼ 0%	37 ▲ 196%	33% ▲ 11%	\$617 ▲ 2%
GRAND TOTAL		374 ▼ -2%	\$520,500 ▲ 4%	98% ▼ 0%	42 ▲ 5%	15% ▲ 2%	\$711 ▼ -5%

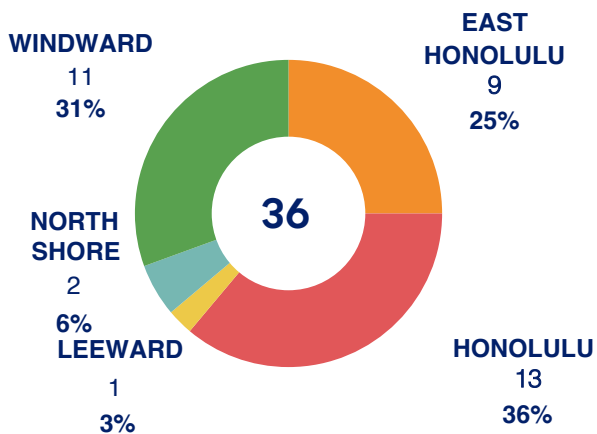
# LUXURY TRANSACTIONS FOR MARCH 2026

FOR SINGLE-FAMILY HOME SALES OVER \$2.5M AND CONDO SALES OVER \$1.5M

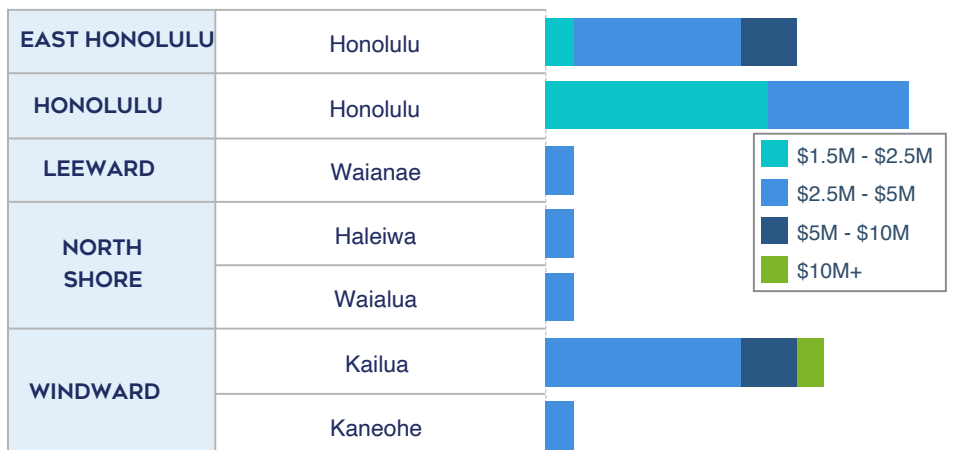
SINGLE-FAMILY HOME SALES		TOTAL SALES	TOTAL VOLUME	AVERAGE SOLD PRICE	MEDIAN SOLD PRICE	% LIST PRICE RECEIVED	MEDIAN DOM	BID-UPS	LIVING \$/SQ FT
NORTH SHORE	Haleiwa	1	\$4,150,000	\$4,150,000	\$4,150,000	88%	209	0%	\$1,935
	Waialua	1	\$3,950,000	\$3,950,000	\$3,950,000	92%	224	0%	\$2,176
EAST HONOLULU	Honolulu	8	\$32,873,000	\$4,109,125	\$3,402,500	92%	67	25%	\$815
HONOLULU	Honolulu	3	\$10,340,000	\$3,446,667	\$3,200,000	99%	133	33%	\$878
LEEWARD	Waianae	1	\$3,190,000	\$3,190,000	\$3,190,000	94%	270	0%	\$971
WINDWARD	Kailua	10	\$47,940,000	\$4,794,000	\$4,095,000	93%	53	0%	\$1,389
	Kaneohe	1	\$2,550,000	\$2,550,000	\$2,550,000	93%	175	0%	\$817
GRAND TOTAL		25	\$104,993,000	\$4,199,720	\$3,425,000	94%	91	12%	\$1,083

CONDO SALES		TOTAL SALES	TOTAL VOLUME	AVERAGE SOLD PRICE	MEDIAN SOLD PRICE	% LIST PRICE RECEIVED	MEDIAN DOM	BID-UPS	LIVING \$/SQ FT
EAST HONOLULU	Honolulu	1	\$1,650,000	\$1,650,000	\$1,650,000	100%	5	0%	\$1,579
HONOLULU	Honolulu	10	\$20,430,000	\$2,043,000	\$1,780,000	97%	90	10%	\$1,559
GRAND TOTAL		11	\$22,080,000	\$2,007,273	\$1,760,000	97%	90	9%	\$1,561

## TOTAL LUXURY SALES BY DISTRICT



## LUXURY SALES BY PRICE RANGE



\* The information in this report is deemed reliable but not guaranteed. Data provided by the Honolulu Board of REALTORS® as of 04/01/26 and is subject to change.