



NAPA COUNTY MARKET UPDATE

Q1 2026





VANGUARD PROPERTIES

MARKET UPDATE

NAPA COUNTY | Q1 2026

Napa County opened 2026 with a clear increase in buyer engagement. The number of single family homes going into contract rose 14.1% year over year, while closed sales increased 9.0%. That is the strongest part of the story. For a market that had become slower and more selective, this is an encouraging sign that adjusted pricing is bringing demand back into the conversation.

The median sales price declined 5.1% to \$925,000, while the median price per square foot fell 5.2% to \$565. Rather than reading this as weakness, the more useful interpretation is that sellers are meeting the market more realistically. That adjustment is giving buyers a clearer reason to act, which helps explain the jump in contracts and closings. In Napa, where many buyers are discretionary, lifestyle-driven, or second-home purchasers, perceived value matters. When pricing feels aligned, activity follows.

Inventory increased 5.1%, giving buyers more options than last year. Homes are also taking longer to sell, with median days on market rising to 62 days. Only 14.8% of homes sold over list price, and sellers received 96.7% of asking price on average. This is not the urgency-driven market of the past few years. It is more measured, more price-sensitive, and more dependent on presentation. For luxury sellers in particular, the lesson is straightforward: the market will reward homes that are priced with discipline, marketed beautifully, and positioned as special.

The broader Napa story remains compelling. Tourism continues to anchor the local economy, with Visit Napa Valley reporting \$525 million in lodging revenue and \$65.7 million in Transient Occupancy Tax collections in FY 2025, even amid broader travel industry headwinds. That matters for real estate because Napa's housing market is not driven only by local employment. It is also shaped by wealth, lifestyle demand, second-home interest, and the enduring appeal of wine country.

Financing conditions have improved from a year ago. Freddie Mac reported that the 30-year fixed-rate mortgage declined again last week to 6.23%. Rates currently stand at their lowest level in the last three spring homebuying seasons. This improvement, coupled with a pickup in purchase applications and refinance activity, as well as an increase in monthly pending home sales, underscores signs of improving momentum in the market.

Napa County's Q1 data points to a healthier, more balanced market than the headline price declines alone would suggest. Prices have adjusted, inventory has improved, and buyers are responding. The market is no longer defined by urgency, but it is active when value is clear. For sellers, success will depend on thoughtful pricing and elevated presentation. For buyers, this may be one of the more attractive windows Napa has offered in recent years, especially before competition strengthens around the best homes.



SINGLE FAMILY HOMES

Q1 2026

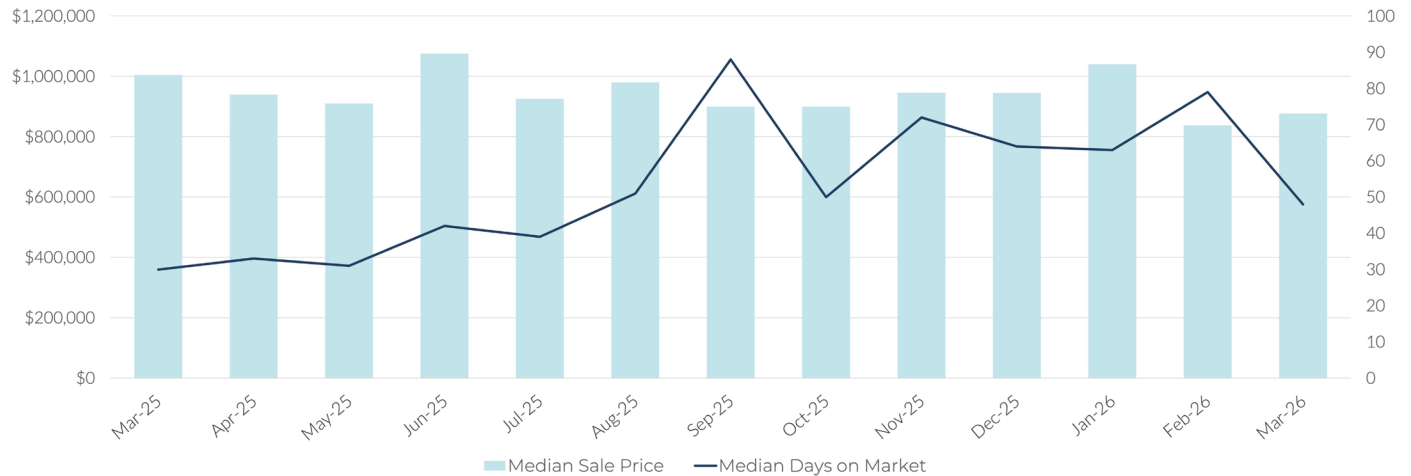
Median Sales Price	\$925,000 ↓
Days on market	62 ↑
\$ / SQ. FT.	\$565 ↓
# For Sale On Last Day Of Quarter	350 ↑
Went Into Contract	186 ↑
Properties Sold	169 ↑

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SINGLE FAMILY RESIDENCES

MONTH-OVER-MONTH COMPARISON



CHANGE IN PAST MONTH:

SALES PRICE: **+4.7%**

DAYS ON MARKET: **-31 days**

YEAR-OVER-YEAR COMPARISON

“Napa County opened 2026 with a clear increase in buyer engagement. The number of single family homes going into contract rose 14.1% year over year, while closed sales increased 9.0%.”

	Q1 2026	Q1 2025	%Δ
Median Sales Price	\$925,000	\$975,000	-5.1%
Median Days On Market	62	47	+31.9%
Median \$ / SQ. FT.	\$565	\$596	-5.2%

	Q1 2026	Q1 2025	%Δ
Total Went Into Contract	186	163	+14.1%
Total Properties Sold	169	155	+9.0%
Total # For Sale Last Day of Quarter	350	333	+5.1%
Total % Of Properties Sold Over List	14.8%	17.4%	-14.9%
Total % Of List Price Received (Average)	96.7%	97.6%	-0.9%

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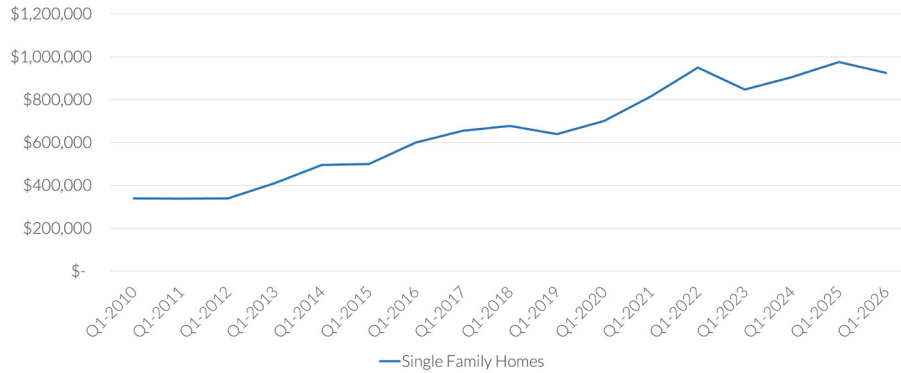
YEAR-OVER-YEAR REGION COMPARISON

CALISTOGA	Q1 2026	Q1 2025	%Δ	2024
Median Sales Price	\$1,265,000	\$1,150,000	+10.0%	\$1,100,000
Median Days on Market	124	44	+181.8%	58
Median Price Per Square Foot	\$593	\$597	-0.7%	\$683
Homes Sold	12*	3*	+300.0%	45*
Homes for Sale Last Day of Quarter	31	36	-13.9%	19
NAPA	Q1 2026	Q1 2025	%Δ	2024
Median Sales Price	\$899,950	\$949,000	-5.2%	\$960,000
Median Days on Market	58	47	+23.4%	37
Median Price Per Square Foot	\$567	\$608	-6.7%	\$597
Homes Sold	118	115	+2.6%	581
Homes for Sale Last Day of Quarter	224	203	+10.3%	123
ST. HELENA	Q1 2026	Q1 2025	%Δ	2024
Median Sales Price	\$1,912,500	\$1,777,000	+7.6%	\$2,150,000
Median Days on Market	116	112	+3.6%	73
Median Price Per Square Foot	\$835	\$748	+11.6%	\$1,008
Homes Sold	14*	15*	-6.7%	77
Homes for Sale Last Day of Quarter	51	56	-8.9%	25

* Small sample size; use caution when interpreting statistics. Sources: SFAR Super Regional MLS & BrokerMetrics. Property types covered: Single-family. Only property data posted on the MLS is covered. All information is deemed reliable, but not guaranteed for accuracy. All data is subject to errors, omissions, revisions, and is not warranted. ©2026 Vanguard Properties. All rights reserved. Equal Housing Opportunity, DRE No. 01486075

YEAR-OVER-YEAR COMPARISONS

MEDIAN SALE PRICE

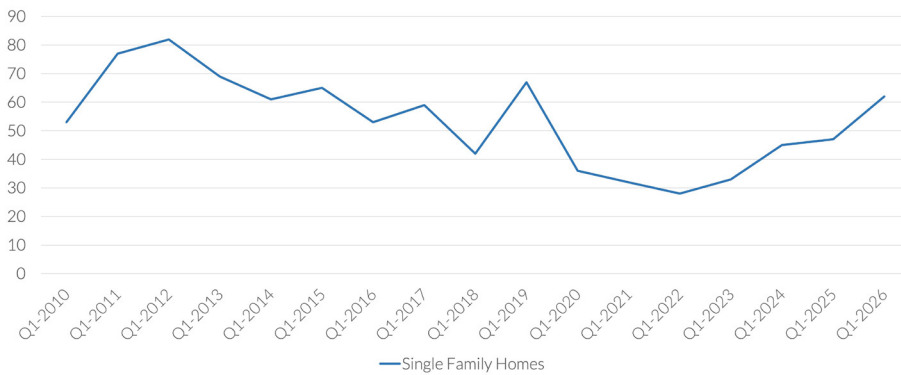


Single Family Residences

\$925,000

-5.1% change year-over-year

MEDIAN MARKET TIME

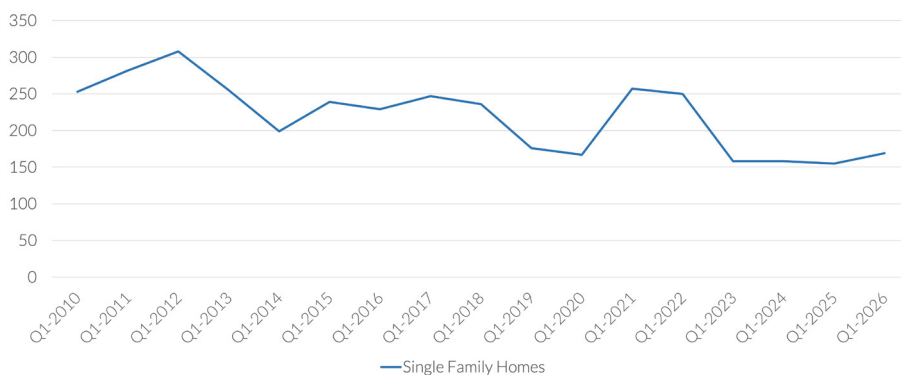


Single Family Residences

62 days

+15 day change year-over-year

NUMBER OF SALES



Single Family Residences

169

+9.0 change year-over-year

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