



NAPA COUNTY MARKET UPDATE

Q2 2025





VANGUARD PROPERTIES

MARKET UPDATE

NAPA COUNTY | Q2 2025

Napa County's housing market offered more breathing room for buyers in the second quarter of 2025, with increased inventory, more selection, and opportunities for well-prepared buyers to find value. While the pace has cooled slightly from last year, the fundamentals remain healthy.

The median sales price came in at \$935,000, down 5.5% from Q2 2024, offering buyers a more approachable entry point into the market. Homes spent a bit more time on the market, with the median days on market rising to 35; still a manageable timeline, especially for those making thoughtful, long-term moves. Price per square foot dipped modestly to \$587, down 4.4%.

Despite the price softening, activity remained relatively steady. 217 homes went into contract, just 1.4% off last year's pace, and 199 closed sales marked a 12.3% year-over-year decline. Notably, inventory rose significantly, up nearly 50% to 443 active homes at the end of the quarter, giving buyers more options and easing competition.

Just over a quarter (25.1%) of homes sold over asking, and the average home sold for 97.8% of list price. Months Supply of Inventory rose to 8.5, signaling a more balanced market and a potential advantage for those ready to act.

The 30-year fixed mortgage rate continues to hover below 7%, and with more homes to choose from and motivated sellers, summer and early fall could be a great window to make a move. As is typical, activity often dips a bit in summer before picking up again in the fall.

Buyers now have more leverage and choices, while sellers still have a chance to attract serious, qualified buyers by pricing and preparing wisely. With market conditions normalizing and long-term fundamentals intact, Napa continues to offer a compelling lifestyle and real estate opportunity for those ready to make their next move.



SINGLE FAMILY HOMES

Q2 2025

Median Sales Price	\$935,000 ↓
Days on market	35 ↑
\$ / SQ. FT.	\$587 ↓
# For Sale On Last Day Of Quarter	443 ↑
Went Into Contract	217 ↓
Properties Sold	199 ↓

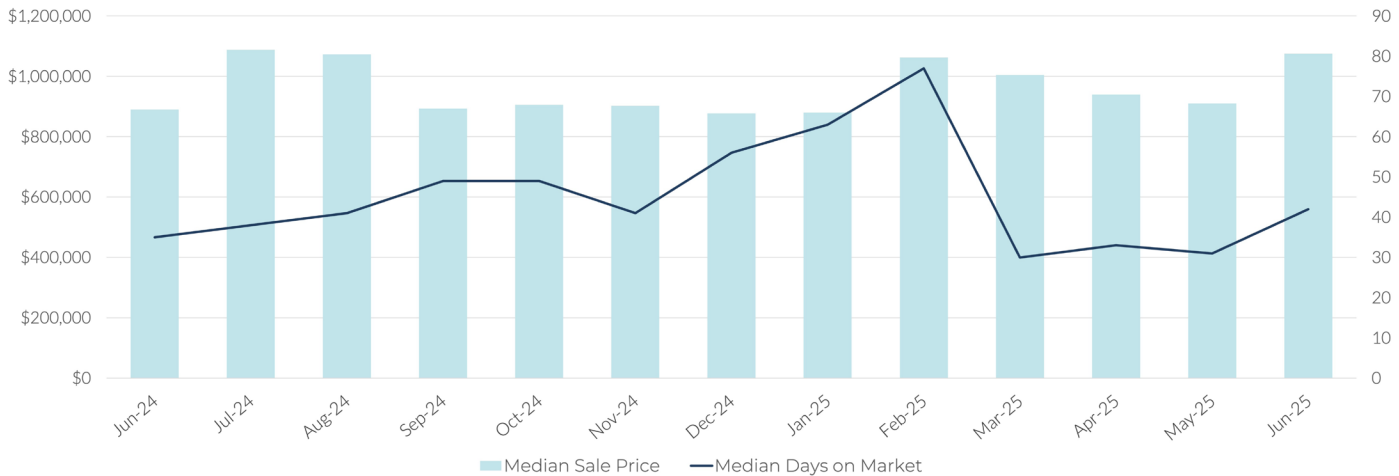


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SINGLE FAMILY RESIDENCES

MONTH-OVER-MONTH COMPARISON



CHANGE IN PAST MONTH:

SALES PRICE: **+18.1%**

DAYS ON MARKET: **+12 days**

YEAR-OVER-YEAR COMPARISON

"Napa County's housing market offered more breathing room for buyers in the second quarter of 2025, with increased inventory, more selection, and opportunities for well-prepared buyers to find value."

	MEDIAN		
	Q2 2025	Q2 2024	%Δ
Sales Price	\$935,000	\$989,000	-5.5%
Days On Market	35	30	+16.7%
\$ / SQ. FT.	\$587	\$614	-4.4%

	TOTAL		
	Q2 2025	Q2 2024	%Δ
Went Into Contract	217	220	-1.4%
Properties Sold	199	233	-14.6%
# For Sale Last Day of Quarter	443	296	+49.7%
% Of Properties Sold Over List	25.1%	33.0%	-23.9%
% Of List Price Received (Average)	97.8%	99.0%	-1.2%

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YEAR-OVER-YEAR REGION COMPARISON

CALISTOGA	Q2 2025	Q2 2024	%Δ	2023
Median Sales Price	\$1,207,500	\$1,555,000	-22.3%	\$977,500
Median Days on Market	34	43	-20.9%	51
Median Price Per Square Foot	\$809	\$673	+20.2%	\$642
Homes Sold	6*	11*	-45.5%	40*
Homes for Sale Last Day of Quarter	42	31	+35.5%	16
NAPA	Q2 2025	Q2 2024	%Δ	2023
Median Sales Price	\$943,665	\$960,000	-1.7%	\$915,000
Median Days on Market	33	29	+13.8%	28
Median Price Per Square Foot	\$592	\$615	-3.7%	\$584
Homes Sold	156	169	-7.7%	570
Homes for Sale Last Day of Quarter	277	183	+51.4%	80
ST. HELENA	Q2 2025	Q2 2024	%Δ	2023
Median Sales Price	\$1,670,000	\$2,150,000	-22.3%	\$1,900,000
Median Days on Market	51	39	+30.8%	62
Median Price Per Square Foot	\$888	\$1,086	-18.2%	\$877
Homes Sold	10*	27*	-63.0%	59
Homes for Sale Last Day of Quarter	76	48	+58.3%	29

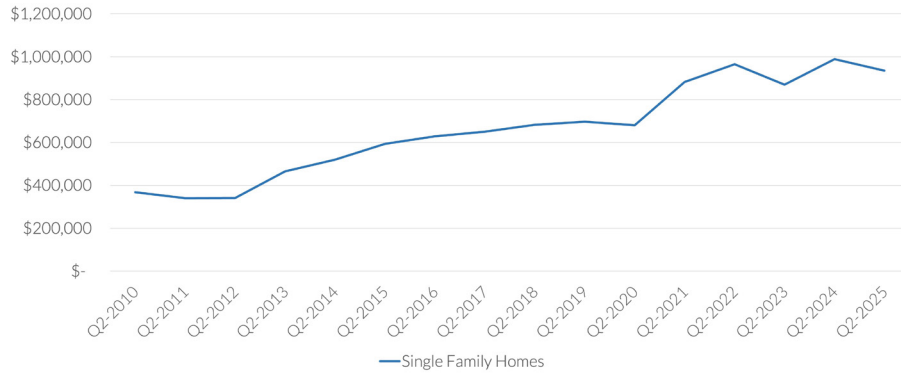
* Small sample size; use caution when interpreting statistics. Sources: SFAR Super Regional MLS & BrokerMetrics. Property types covered: Single-family. Only property data posted on the MLS is covered. All information is deemed reliable, but not guaranteed for accuracy. All data is subject to errors, omissions, revisions, and is not warranted. ©2025 Vanguard Properties. All rights reserved. Equal Housing Opportunity. DRE No. 01486075

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YEAR-OVER-YEAR COMPARISONS

MEDIAN SALE PRICE

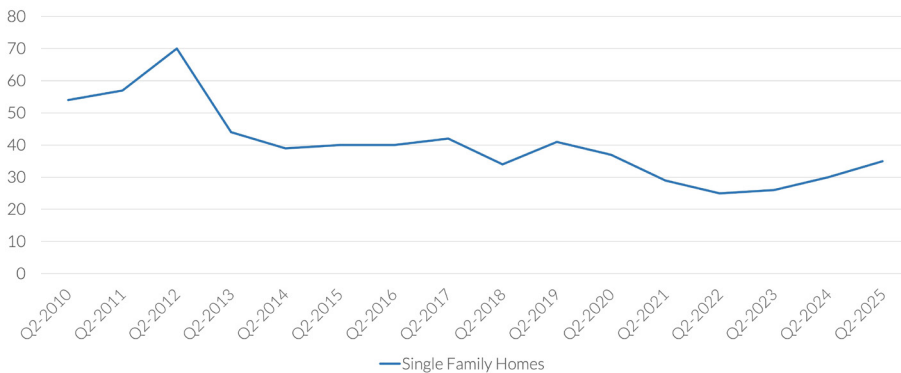


Single Family Residences

\$935,000

-5.5% change year-over-year

MEDIAN MARKET TIME

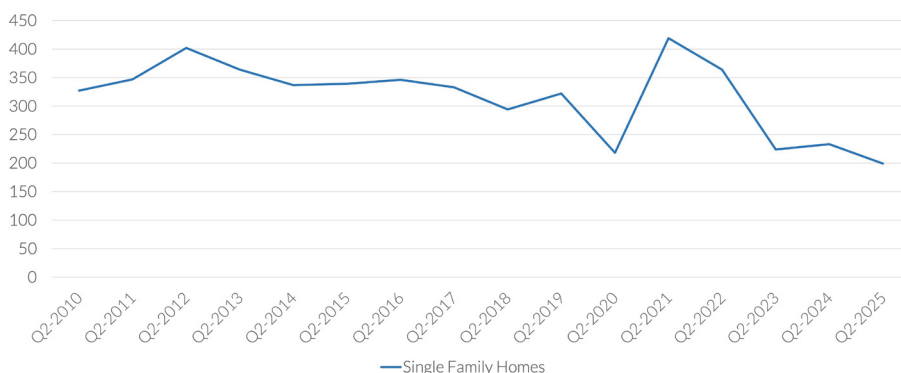


Single Family Residences

35 days

+5 day change year-over-year

NUMBER OF SALES



Single Family Residences

199

-14.6% change year-over-year