NAPA COUNTY MARKET UPDATE

Q2 2026

VANGUARD PROPERTIES

MARKET UPDATE

NAPA COUNTY | Q2 2026

Napa County's single family home market gained meaningful momentum in Q2. Closed sales jumped 30.2% year over year to 259, the strongest Q2 total since 2022, while homes going into contract increased 8.3%. Quarter-end inventory declined slightly to 437 homes, indicating stronger absorption rather than activity driven by additional supply.

The median sales price dipped just 1.1% to $925,000, while the median price per square foot declined 5.1% to $557. Homes took a median of 47 days to sell, and the share selling over list price fell from 25.1% to 16.6%. Even so, sellers received an average of 97.3% of asking price. Buyers have more time and negotiating room, but the substantial increase in sales shows they are acting when pricing and presentation align.

The City of Napa accounted for more than three-quarters of countywide sales, with transactions rising 26.9% while quarter-end inventory declined 9.4%. St. Helena stood out at the luxury end, with sales nearly doubling to 19 and the median price rising 31.7% to $2.2 million. These smaller upvalley markets can be volatile, but the results point to renewed high-end demand.

Napa's lifestyle market continues to benefit from improving financial conditions. The S&P 500 gained 14.9% in Q2, while mortgage rates remain modestly below year-ago levels. Napa's tourism economy also remains resilient, generating $525 million in lodging revenue and supporting more than 16,000 local jobs.

Napa County entered the second half of 2026 with stable pricing and considerably more transactions. Sellers still need disciplined pricing and elevated presentation, while buyers benefit from greater negotiating power. The market is more measured than competitive, but it is clearly active when value is compelling.

SINGLE FAMILY HOMES

Q2 2026

Median Sales Price	$925,000 ↓
Days on market	47 ↑
$ / SQ. FT.	$557 ↓
# For Sale On Last Day Of Quarter	437 ↓
Went Into Contract	235 ↑
Properties Sold	259 ↑

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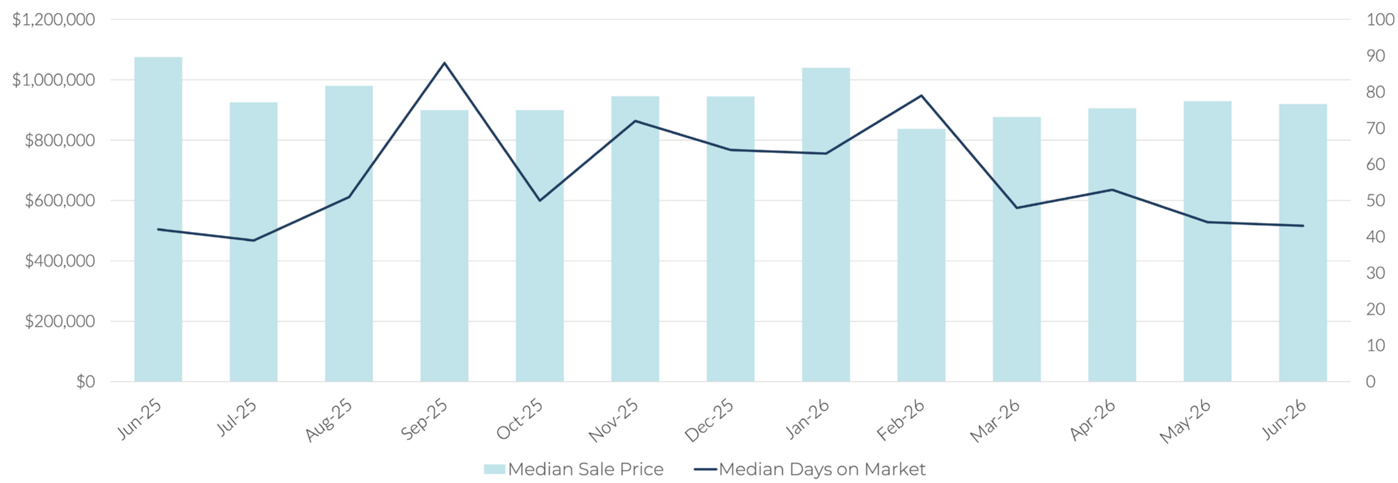
SINGLE FAMILY RESIDENCES

MONTH-OVER-MONTH COMPARISON



CHANGE IN PAST MONTH: SALES PRICE: **-1.0%** DAYS ON MARKET: **-1 day**

YEAR-OVER-YEAR COMPARISON

"Napa County's single family home market gained meaningful momentum in Q2. Closed sales jumped 30.2% year over year to 259, the strongest Q2 total since 2022, while homes going into contract increased 8.3%."

MEDIAN

	Q2 2026	Q2 2025	%Δ
Sales Price	$925,000	$935,000	-1.1%
Days On Market	47	35	+34.3%
$ / SQ. FT.	$557	$587	-5.1%

TOTAL

	Q2 2026	Q2 2025	%Δ
Went Into Contract	235	217	+8.3%
Properties Sold	259	199	+30.2%
# For Sale Last Day of Quarter	437	443	-1.4%
% Of Properties Sold Over List	16.6%	25.1%	-33.9%
% Of List Price Received *(Average)*	97.3%	97.8%	-0.5%

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YEAR-OVER-YEAR REGION COMPARISON

CALISTOGA	Q2 2026	Q2 2025	%Δ	2024
Median Sales Price	$977,500	$1,207,500	-19.0%	$1,100,000
Median Days on Market	40	34	+17.6%	58
Median Price Per Square Foot	$684	$809	-15.5%	$683
Homes Sold	8*	6*	33.3%	45*
Homes for Sale Last Day of Quarter	49	42	+16.7%	19

NAPA	Q2 2026	Q2 2025	%Δ	2024
Median Sales Price	$925,000	$943,665	-2.0%	$960,000
Median Days on Market	47	33	+42.4%	37
Median Price Per Square Foot	$559	$592	-5.6%	$597
Homes Sold	198	156	+26.9%	581
Homes for Sale Last Day of Quarter	251	277	-9.4%	123

ST. HELENA	Q2 2026	Q2 2025	%Δ	2024
Median Sales Price	$2,200,000	$1,670,000	+31.7%	$2,150,000
Median Days on Market	56	51	+9.8%	73
Median Price Per Square Foot	$1,040	$888	+17.1%	$1,008
Homes Sold	19*	10*	+90.0%	77
Homes for Sale Last Day of Quarter	74	76	-2.6%	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. Equal Housing Opportunity. DRE No. 01486075

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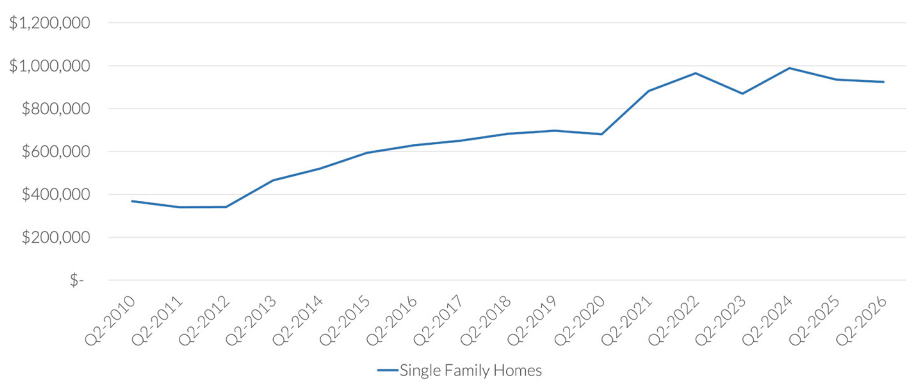
YEAR-OVER-YEAR COMPARISONS

MEDIAN SALE PRICE

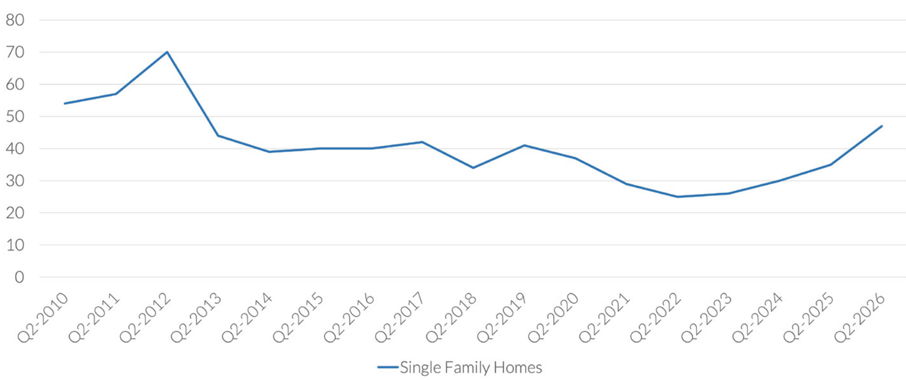


Single Family Residences

$925,000

-1.1% change year-over-year

MEDIAN MARKET TIME

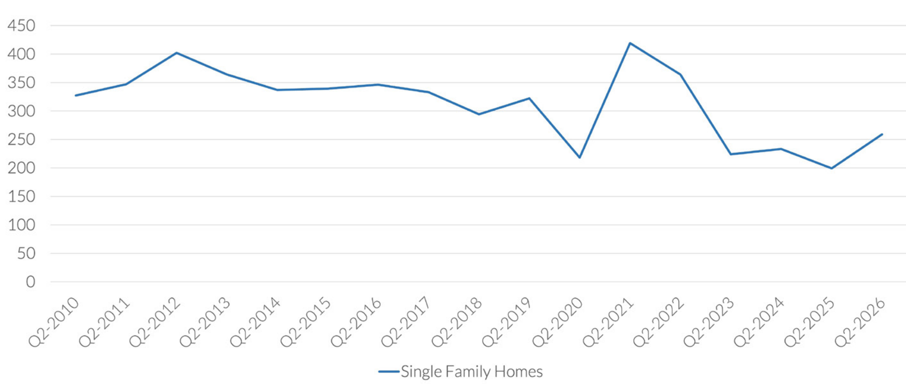


Single Family Residences

47 days

+17 day change year-over-year

NUMBER OF SALES



Single Family Residences

259

+30.2% change year-over-year

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