



# NAPA COUNTY MARKET UPDATE

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Q1 2025







VANGUARD PROPERTIES

# MARKET UPDATE

NAPA COUNTY | Q1 2025

The Napa County real estate market showed healthy growth and signs of balance in the first quarter of 2025. The median sales price for single-family homes rose 7.7 percent year over year, indicating continued strength at the higher end of the market. However, the median price per square foot declined 3.2 percent, suggesting that while buyers are still willing to pay more overall, they are being more selective on a per-foot basis.

The number of homes sold declined slightly, down 1.9 percent compared to the first quarter of 2024, while the median days on market increased from 44 to 47, pointing to a slower pace overall. The share of homes selling over list price dropped 23.7 percent, though the percent of list price received edged up 0.2 percent, showing that pricing remains fairly stable.

Inventory saw a sharp rise, with active listings up 67.3 percent year over year. Months' Supply of Inventory rose to 5.6, suggesting a more balanced market where buyers have more negotiating power and time to make decisions.

With prices rising but competition easing slightly, and more inventory coming online, Napa County is positioned for a more balanced yet still active spring market.



## SINGLE FAMILY HOMES

Q1 2025

Median Sales Price	\$975,000 ↑
Days on market	47 ↑
\$ / SQ. FT.	\$596 ↓
# For Sale On Last Day Of Quarter	333 ↑
Went Into Contract	163 ↓
Properties Sold	155 ↓

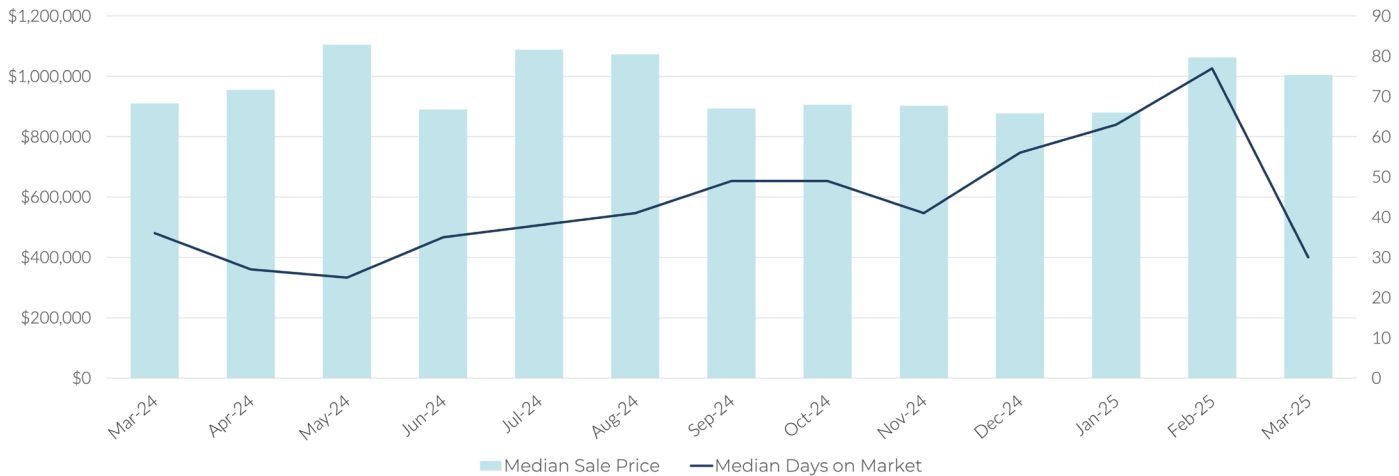


# NAPA COUNTY MARKET UPDATE

Q1 2025

## SINGLE FAMILY RESIDENCES

### MONTH-OVER-MONTH COMPARISON



CHANGE IN PAST MONTH:

SALES PRICE: **-5.4%**

DAYS ON MARKET: **-47 days**

### YEAR-OVER-YEAR COMPARISON

*"The median sales price for single-family homes rose 7.7 percent year over year, indicating continued strength at the higher end of the market."*

	MEDIAN		
	Q1 2025	Q1 2024	%Δ
Sales Price	\$975,000	\$905,000	+7.7%
Days On Market	47	44	+6.8%
\$ / SQ. FT.	\$596	\$616	-3.2%

	TOTAL		
	Q1 2025	Q1 2024	%Δ
Went Into Contract	163	174	-6.3%
Properties Sold	155	158	-1.9%
# For Sale Last Day of Quarter	333	199	+67.3%
% Of Properties Sold Over List	17.4%	22.8%	-23.7%
% Of List Price Received (Average)	97.6%	97.4%	+0.2%

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Q1 2025

## YEAR-OVER-YEAR REGION COMPARISON

CALISTOGA	Q1 2025	Q1 2024	%Δ	2023
Median Sales Price	\$1,150,000	\$767,000	+49.9%	\$977,500
Median Days on Market	44	118	-62.7%	51
Median Price Per Square Foot	\$597	\$631	-5.4%	\$642
Homes Sold	3*	10*	-70.0%	40*
Homes for Sale Last Day of Quarter	36	17	+111.8%	16
NAPA	Q1 2025	Q1 2024	%Δ	2023
Median Sales Price	\$949,000	\$902,500	+5.2%	\$915,000
Median Days on Market	47	33	+42.4%	28
Median Price Per Square Foot	\$608	\$627	-3.0%	\$584
Homes Sold	115	102	+12.7%	570
Homes for Sale Last Day of Quarter	203	114	+78.1%	80
ST. HELENA	Q1 2025	Q1 2024	%Δ	2023
Median Sales Price	\$1,777,000	\$2,512,500	-29.3%	\$1,900,000
Median Days on Market	112	120	-6.7%	62
Median Price Per Square Foot	\$748	\$824	-9.2%	\$877
Homes Sold	15*	16*	-6.3%	59
Homes for Sale Last Day of Quarter	56	38	+47.4%	29

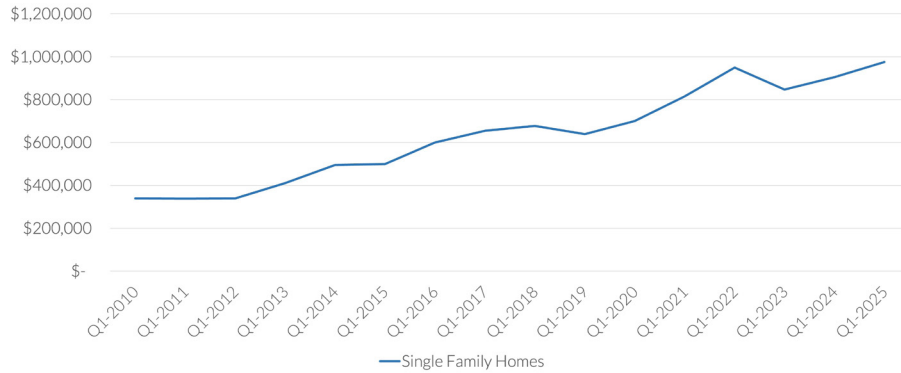
\* Small sample size; use caution when interpreting statistics. Sources: SFAR Super Regional MLS & BrokerMetrics. Property types covered: Single-family. Only property data posted on the MLS is covered. All information is deemed reliable, but not guaranteed for accuracy. All data is subject to errors,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

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Q1 2025

## YEAR-OVER-YEAR COMPARISONS

### MEDIAN SALE PRICE

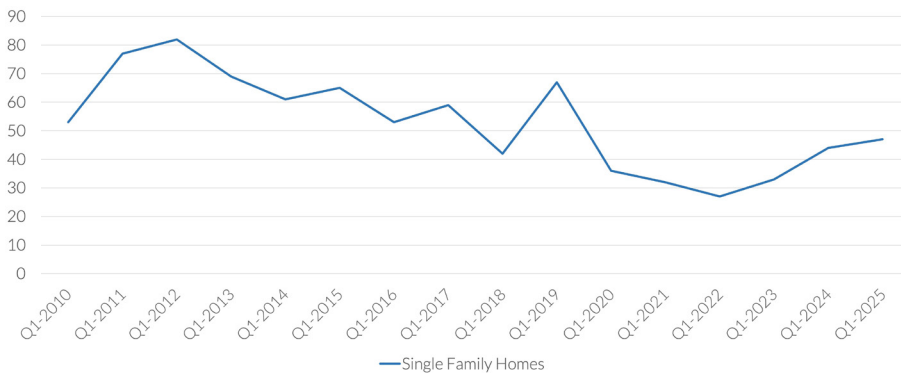


Single Family Residences

**\$975,000**

+7.7% change year-over-year

### MEDIAN MARKET TIME

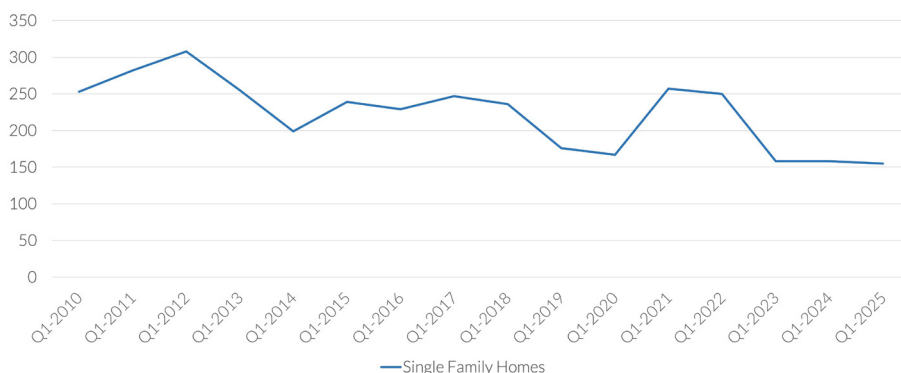


Single Family Residences

**47 days**

+3 day change year-over-year

### NUMBER OF SALES



Single Family Residences

**155**

-1.9% change year-over-year