



NAPA COUNTY MARKET UPDATE

Q3 2025





VANGUARD PROPERTIES

MARKET UPDATE

NAPA COUNTY | Q3 2025

Napa County's housing market showed steady momentum through the third quarter of 2025, balancing softer prices with signs of renewed buyer activity. Inventory remains higher than last year, giving buyers more room to shop and negotiate, while sellers continue to see solid demand for well-priced homes.

The median sales price for single-family homes settled at \$944,500, down 7.9% from a year earlier, reflecting a market that's correcting slightly after several years of rapid appreciation. At the same time, price per square foot increased 3.1% to \$594, showing that quality listings and desirable locations are still commanding strong value. Homes took longer to sell, with median days on market rising by 9 days to 52, but overall sales volume actually improved: 232 homes sold, up 5% year-over-year, while 224 went into contract, nearly matching last year's pace.

Inventory continued to build, ending September with 450 active listings, a 32.7% increase from 2024. That added supply helped ease competition — only 15.1% of homes sold over asking, down from last year's frenzied levels — and the average sale-to-list ratio held firm at 97.2%, just slightly lower year-over-year. With 5.8 months of inventory, the market is gradually moving toward balance, creating opportunities on both sides of the table.

Overall, Napa's market is settling into a healthier, more sustainable rhythm. Buyers benefit from greater choice and negotiating room, while sellers who price strategically are still finding success. With rates stabilizing and lifestyle demand staying strong, the market feels poised for a confident close to 2025.



SINGLE FAMILY HOMES

Q3 2025

Median Sales Price	\$944,500 ↓
Days on market	52 ↑
\$ / SQ. FT.	\$594 ↑
# For Sale On Last Day Of Quarter	450 ↑
Went Into Contract	224 ↓
Properties Sold	232 ↑

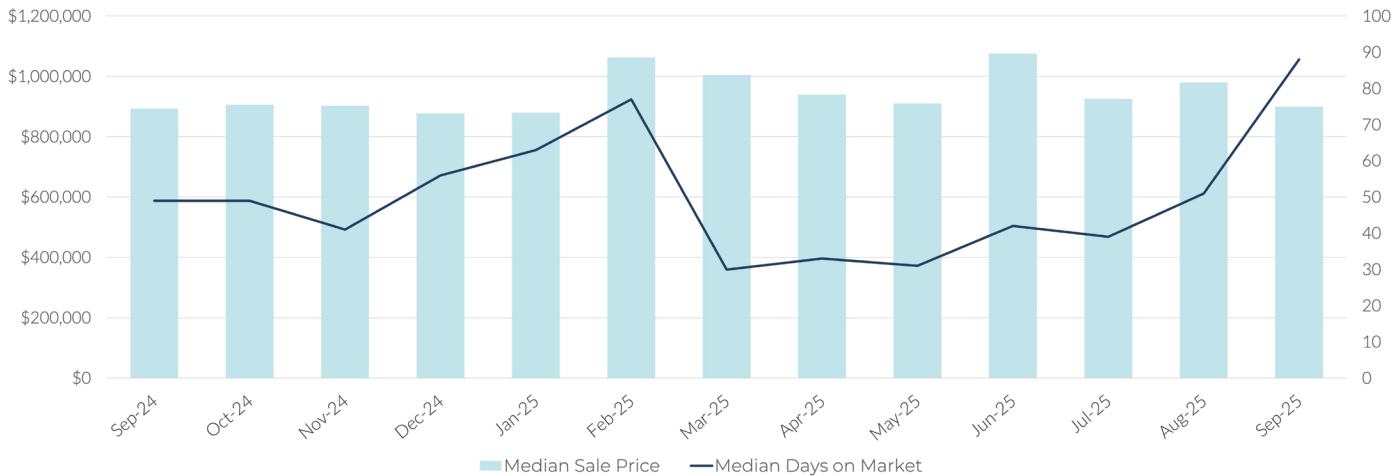


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SINGLE FAMILY RESIDENCES

MONTH-OVER-MONTH COMPARISON



CHANGE IN PAST MONTH:

SALES PRICE: **-8.2%**

DAYS ON MARKET: **+37 days**

YEAR-OVER-YEAR COMPARISON

"Inventory continued to build, ending September with 450 active listings, a 32.7% increase from 2024. That added supply helped ease competition..."

	Q3 2025	Q3 2024	%Δ
Sales Price	\$944,500	\$1,025,000	-7.9%
Days On Market	52	43	+20.9%
\$ / SQ. FT.	\$594	\$576	+3.1%

	Q3 2025	Q3 2024	%Δ
Went Into Contract	224	226	-0.9%
Properties Sold	232	221	+5.0%
# For Sale Last Day of Quarter	450	339	+32.7%
% Of Properties Sold Over List	15.1%	23.1%	-34.6%
% Of List Price Received (Average)	97.2%	98.0%	-0.8%

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YEAR-OVER-YEAR REGION COMPARISON

CALISTOGA	Q3 2025	Q3 2024	%Δ	2023
Median Sales Price	\$2,900,675	\$1,289,500	+124.9%	\$977,500
Median Days on Market	68	49	+38.8%	51
Median Price Per Square Foot	\$858	\$731	+17.4%	\$642
Homes Sold	8*	13*	-38.5%	40*
Homes for Sale Last Day of Quarter	49	38	+28.9%	16
NAPA	Q3 2025	Q3 2024	%Δ	2023
Median Sales Price	\$925,000	\$1,050,000	-11.9%	\$915,000
Median Days on Market	52	43	+20.9%	28
Median Price Per Square Foot	\$584	\$580	+0.7%	\$584
Homes Sold	162	161	+0.6%	570
Homes for Sale Last Day of Quarter	281	202	+39.1%	80
ST. HELENA	Q3 2025	Q3 2024	%Δ	2023
Median Sales Price	\$2,185,000	\$1,900,000	+15.0%	\$1,900,000
Median Days on Market	67	26	+157.7%	62
Median Price Per Square Foot	\$927	\$816	+13.6%	\$877
Homes Sold	25*	11*	+127.3%	59
Homes for Sale Last Day of Quarter	78	58	+34.5%	29

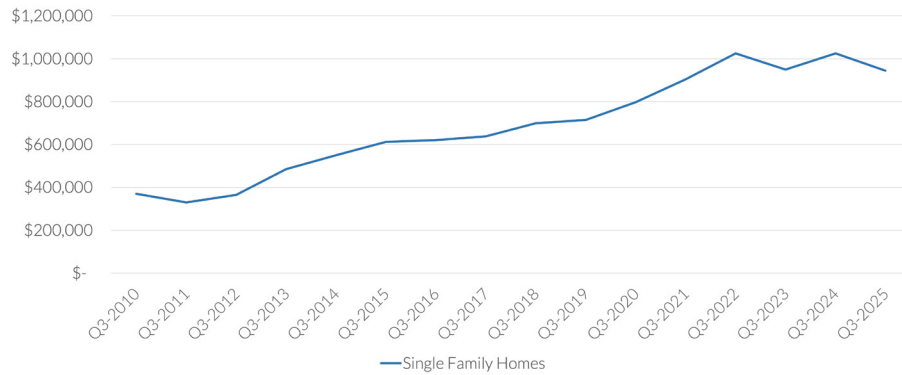
* Small sample size; use caution when interpreting statistics. Sources: SFAR Super Regional MLS & BrokerMetrics. Property types covered: Single-family. Only property data posted on the MLS is covered. All information is deemed reliable, but not guaranteed for accuracy. All data is subject to errors, 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

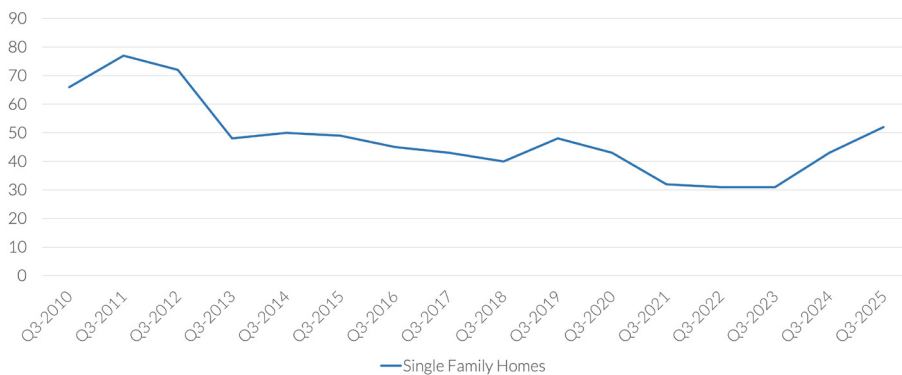


Single Family Residences

\$944,500

-7.9% change year-over-year

MEDIAN MARKET TIME

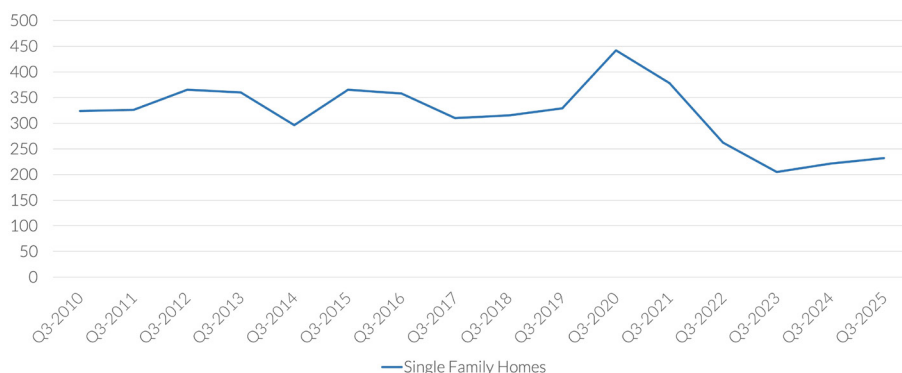


Single Family Residences

52 days

+9 day change year-over-year

NUMBER OF SALES



Single Family Residences

232

+5.0% change year-over-year