SONOMA COUNTY MARKET UPDATE

AUGUST 2026

VANGUARD PROPERTIES

MARKET UPDATE

SONOMA COUNTY | AUGUST 2026

Sonoma County's housing market remained highly competitive in July despite fewer homes changing hands. The share of properties selling above asking jumped 22.7% to 37.9%, a gain of 7 percentage points, while sellers received an average of 102.6% of list price, up 3.6 points. These gains were especially notable as month end inventory fell 18.6% to 878 homes, leaving buyers with 201 fewer options than a year ago.

Buyer urgency also increased. Homes sold five days faster, in a median of 35 days, while the median price per square foot rose 5.1% to $531. Although the median sales price edged down 1.3% to $834,000, rising price per square foot, faster market times, and stronger bidding suggest that underlying demand was firmer than the headline median alone implies. The modest price decline may partly reflect the mix of homes sold during the month rather than broad price erosion.

Closed sales declined 4.1% to 372, while contract activity fell 9.1% to 348. Both measures pulled back considerably less than inventory, suggesting that limited selection, rather than a lack of buyer interest, was an important constraint on activity. July sales also remained well above 2023 levels and close to 2024, reinforcing the market's overall stability.

Recent economic data provided additional encouragement. Santa Rosa and Petaluma nonfarm employment grew 0.5% over the past year through June, including gains of 2.7% in education and health services and 2.3% in leisure and hospitality. National inflation also eased for a second consecutive month in July, while core inflation fell to 2.5%. Although borrowing costs remain elevated, Freddie Mac reported that mortgage rates were relatively stable at 6.67% and noted improving affordability and increased mortgage application activity.

SINGLE FAMILY HOMES

JULY 2026

Median Sales Price	$834,000 ↓
Days on market	35 ↓
$ / SQ. FT.	$531 ↑
# For Sale On Last Day Of Month	878 ↓
Went Into Contract	348 ↓
Properties Sold	372 ↓

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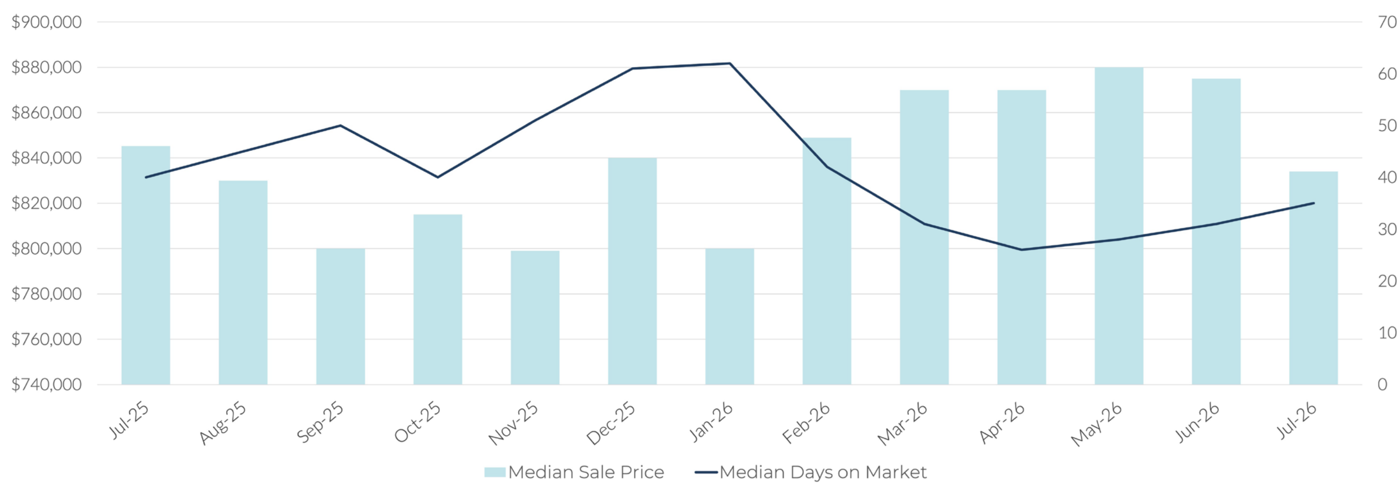
SINGLE FAMILY RESIDENCES

MONTH-OVER-MONTH COMPARISON



CHANGE IN PAST MONTH: SALES PRICE: -4.7% DAYS ON MARKET: **+4 days**

YEAR-OVER-YEAR COMPARISON

"The share of properties selling above asking jumped 22.7% to 37.9%, a gain of 7 percentage points, while sellers received an average of 102.6% of list price, up 3.6 points. These gains were especially notable as month end inventory fell 18.6% to 878 homes, leaving buyers with 201 fewer options than a year ago."

MEDIAN

	JUL-2026	JUL-2025	%Δ
Sales Price	$834,000	$845,226	-1.3%
Days On Market	35	40	-12.5%
$ / SQ. FT.	$531	$505	+5.1%

TOTAL

	JUL-2026	JUL-2025	%Δ
Went Into Contract	348	383	-9.1%
Properties Sold	372	388	-4.1%
# For Sale Last Day of Month	878	1,079	-18.6%
% Of Properties Sold Over List	37.9%	30.9%	+22.7%
% Of List Price Received *(Average)*	102.6%	99.0%	+3.6%

VANGUARD PROPERTIES

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YEAR-OVER-YEAR REGION COMPARISON

REGION	HOMES SOLD (TOTAL) Q2 2026	HOMES SOLD (TOTAL) Q2 2025	HOMES SOLD %Δ	DAYS ON MARKET (MEDIAN) Q2 2026	DAYS ON MARKET (MEDIAN) Q2 2025	DAYS ON MARKET %Δ	SALE PRICE (MEDIAN) Q2 2026	SALE PRICE (MEDIAN) Q2 2025	SALE PRICE %Δ
Bodega Bay	16*	13*	▲ 23%	55	25	▲ 120%	$1,775,000	$1,325,000	▲ 34%
Cazadero	4*	11*	▼ -64%	49	29	▲ 69%	$593,000	$620,000	▼ 4%
Cloverdale	24*	16*	▲ 50%	29	32	▼ 9%	$628,500	$655,000	▼ 4%
Cotati	11*	12*	▼ -8%	15	38	▼ 61%	$915,000	$826,000	▲ 11%
Forestville	24*	15*	▲ 60%	26	43	▼ 40%	$632,500	$632,500	0%
Geyserville	6*	3*	▲ 100%	82	112	▼ 27%	$987,000	$1,500,000	▼ 34%
Glen Ellen	13*	11*	▲ 18%	45	44	▲ 2%	$1,525,000	$1,400,000	▲ 9%
Guerneville	31*	30*	▲ 3%	30	34	▼ 12%	$555,000	$595,000	▼ 7%
Healdsburg	45*	47*	▼ -4%	43	34	▲ 26%	$1,330,000	$1,225,000	▲ 9%
Jenner	5*	3*	▲ 67%	26	37	▼ 30%	$1,232,000	$985,000	▲ 25%
Kenwood	9*	9*	0%	46	60	▼ 23%	$1,998,000	$2,000,000	▼ 0%
Monte Rio	6*	3*	▲ 100%	25	12	▲ 108%	$579,500	$705,000	▼ 18%
Occidental	6*	9*	▼ -33%	16	35	▼ 54%	$1,542,500	$1,400,000	▲ 10%
Penngrove	7*	5*	▲ 40%	28	31	▼ 10%	$1,507,000	$1,650,924	▼ 9%
Petaluma	141	144	▼ -2%	22	25	▼ 12%	$957,500	$956,000	▲ 0%
Rohnert Park	82	91	▼ -10%	29	26	▲ 12%	$772,000	$752,000	▲ 3%
Santa Rosa	417	413	▲ 1%	31	33	▼ 6%	$780,000	$793,000	▼ 2%
Sebastopol	65	60	▲ 8%	21	17	▲ 24%	$1,150,000	$1,377,500	▼ 17%
Sonoma	114	79	▲ 44%	36	35	▲ 3%	$1,249,000	$1,200,000	▲ 4%
Windsor	67	63	▲ 6%	28	31	▼ 10%	$826,000	$840,000	▼ 2%
SONOMA COUNTY	1,121	1,052	▲ 7%	28	31	▼ 10%	$875,000	$855,000	▲ 2%

* *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.*

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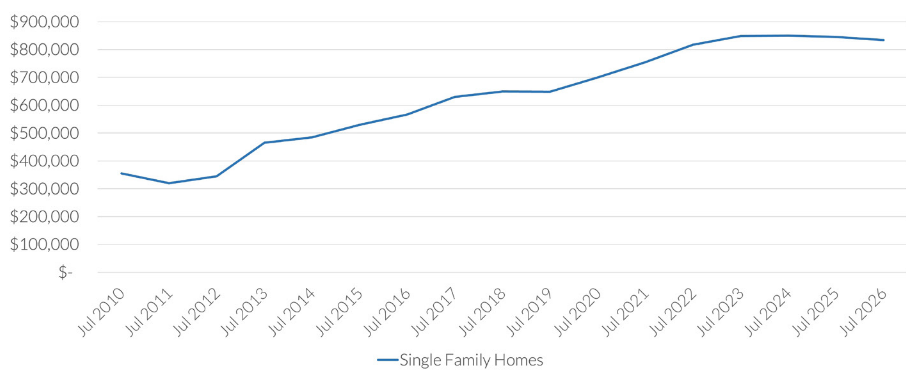
YEAR-OVER-YEAR COMPARISONS

MEDIAN SALE PRICE

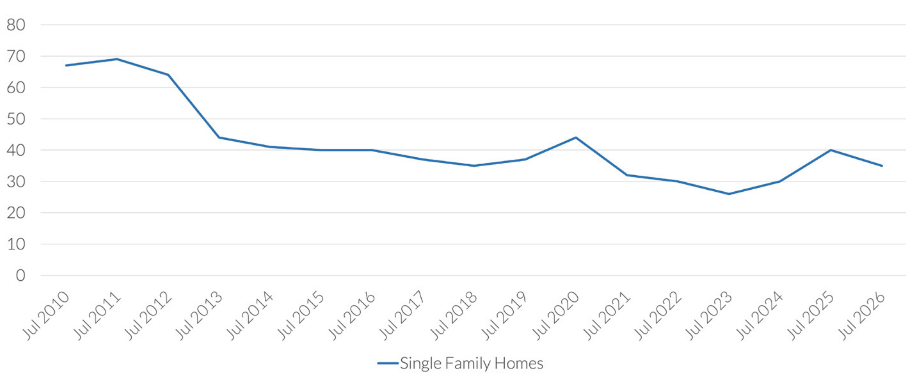


Single Family Residences

$834,000

-1.3% change year-over-year

MEDIAN MARKET TIME

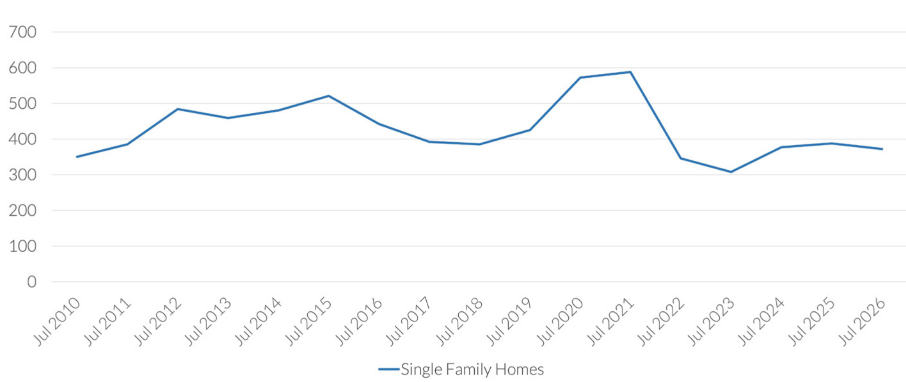


Single Family Residences

35 days

-5 day change year-over-year

NUMBER OF SALES



Single Family Residences

372

-4.1% change year-over-year

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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