



SONOMA COUNTY MARKET UPDATE

DECEMBER 2025





VANGUARD PROPERTIES

MARKET UPDATE

SONOMA COUNTY | DECEMBER 2025

The single-family market showed encouraging momentum in November, with several key indicators pointing to steady buyer engagement despite a more measured pace. One of the strongest signals came from contract activity, which rose 10.3 percent to 258, and closed sales followed suit, up 4.4 percent to 283. This increase in transactional volume highlights that buyers remain active, even as they take more time evaluating homes.

Inventory continued to expand modestly, with the number of homes for sale up 8.6 percent to 743, giving buyers more selection than they've had in recent years. This added supply played a role in shaping pricing dynamics: the median sales price eased 2.0 percent to \$799,000, while the median price per square foot held virtually steady, dipping just 0.2 percent to \$495. Homes spent an average of 51 days on market, 12 days longer than last year — a seasonal and inventory-driven shift consistent with typical winter slowdown.

Even with a calmer pace, sellers remained competitive. On average, homes still achieved 99.0 percent of list price, and while 24.0 percent sold over asking — a decrease from last year — the market continues to reward well-priced and well-prepared listings. With Months' Supply of Inventory at 2.9, conditions are trending toward balance while still supporting steady movement.



SINGLE FAMILY HOMES

NOVEMBER 2025

Median Sales Price	\$799,000 ↓
Days on market	51 ↑
\$ / SQ. FT.	\$495 ↓
# For Sale On Last Day Of Month	743 ↑
Went Into Contract	258 ↑
Properties Sold	283 ↑

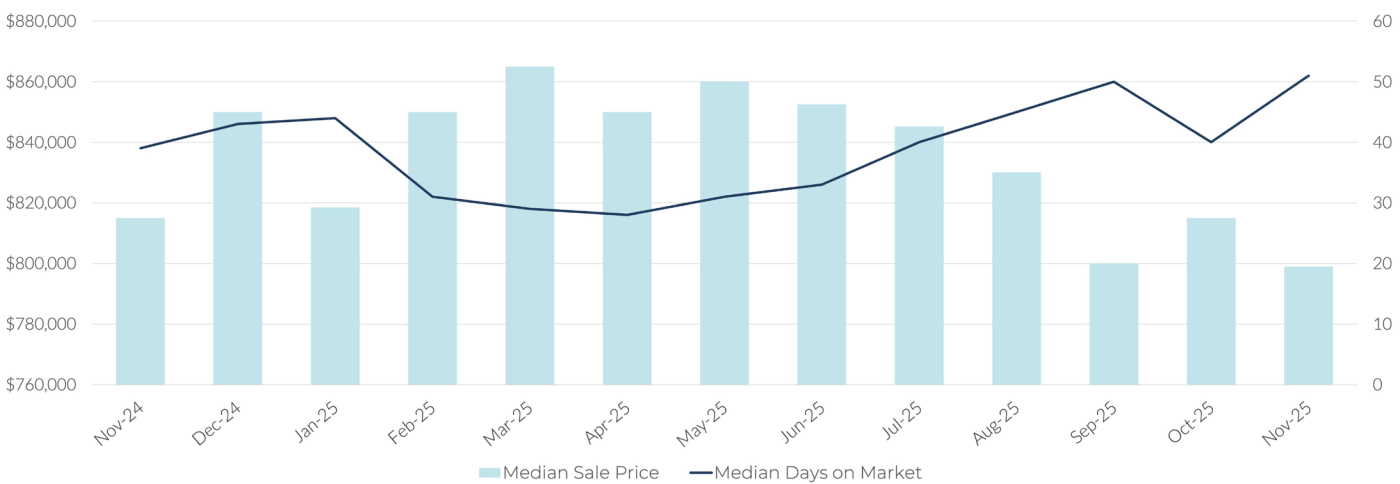


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SINGLE FAMILY RESIDENCES

MONTH-OVER-MONTH COMPARISON



CHANGE IN PAST MONTH:

SALES PRICE: -2.0%

DAYS ON MARKET: +11 days

YEAR-OVER-YEAR COMPARISON

“The single-family market showed encouraging momentum in November, with several key indicators pointing to steady buyer engagement despite a more measured pace.”

	MEDIAN		
	NOV-2025	NOV-2024	%Δ
Sales Price	\$799,000	\$815,000	-2.0%
Days On Market	51	39	+30.8%
\$ / SQ. FT.	\$495	\$496	-0.2%

	TOTAL		
	NOV-2025	NOV-2024	%Δ
Went Into Contract	258	234	+10.3%
Properties Sold	283	271	+4.4%
# For Sale Last Day of Month	743	684	+8.6%
% Of Properties Sold Over List	24.0%	32.8%	-26.8%
% Of List Price Received (Average)	99.0%	99.3%	-0.3%

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 REGION COMPARISON

REGION	HOMES SOLD (TOTAL)			DAYS ON MARKET (MEDIAN)			SALE PRICE (MEDIAN)		
	Q3 2025	Q3 2024	%Δ	Q3 2025	Q3 2024	%Δ	Q3 2025	Q3 2024	%Δ
Bodega Bay	10*	11*	▼ 9%	74	43	▲ 72%	\$1,219,500	\$1,749,000	▼ 30%
Cazadero	9*	8*	▲ 13%	53	37	▲ 43%	\$478,000	\$607,500	▼ 21%
Cloverdale	27*	30*	▼ 10%	84	47	▲ 79%	\$595,000	\$620,500	▼ 4%
Cotati	16*	12*	▲ 33%	21	47	▼ 55%	\$766,500	\$850,000	▼ 10%
Forestville	26*	27*	▼ 4%	62	32	▲ 94%	\$722,500	\$555,555	▲ 30%
Geyserville	4*	2*	▲ 100%	121	248	▼ 51%	\$1,065,000	\$947,500	▲ 12%
Glen Ellen	6*	13*	▼ 54%	45	76	▼ 41%	\$1,197,500	\$1,299,000	▼ 8%
Guerneville	41*	33*	▲ 24%	57	50	▲ 14%	\$515,000	\$635,000	▼ 19%
Healdsburg	60	33*	▲ 82%	54	53	▲ 2%	\$1,005,000	\$1,240,000	▼ 19%
Jenner	3*	2*	▲ 50%	35	17	▲ 106%	\$910,000	\$1,235,000	▼ 26%
Kenwood	7*	3*	▲ 133%	64	28	▲ 129%	\$1,388,000	\$1,500,000	▼ 7%
Monte Rio	5*	20*	▼ 75%	88	41	▲ 115%	\$585,000	\$578,500	▲ 1%
Occidental	6*	2*	▲ 200%	28	34	▼ 18%	\$1,117,500	\$1,327,300	▼ 16%
Penngrove	17*	6*	▲ 183%	25	34	▼ 26%	\$1,351,000	\$1,261,500	▲ 7%
Petaluma	131	133	▼ 2%	31	27	▲ 15%	\$965,000	\$940,000	▲ 3%
Rohnert Park	83	85	▼ 2%	37	27	▲ 37%	\$749,000	\$767,500	▼ 2%
Santa Rosa	405	404	▲ 0%	46	32	▲ 44%	\$755,000	\$785,000	▼ 4%
Sebastopol	59	58	▲ 2%	35	31	▲ 13%	\$1,190,000	\$1,248,000	▼ 5%
Sonoma	97	83	▲ 17%	58	43	▲ 35%	\$1,130,000	\$1,125,000	▲ 0%
Windsor	64	55	▲ 16%	35	28	▲ 25%	\$817,500	\$815,130	▲ 0%
SONOMA COUNTY	1,096	896	▲ 22%	45	34	▲ 32%	\$828,280	\$839,232	▼ 1%

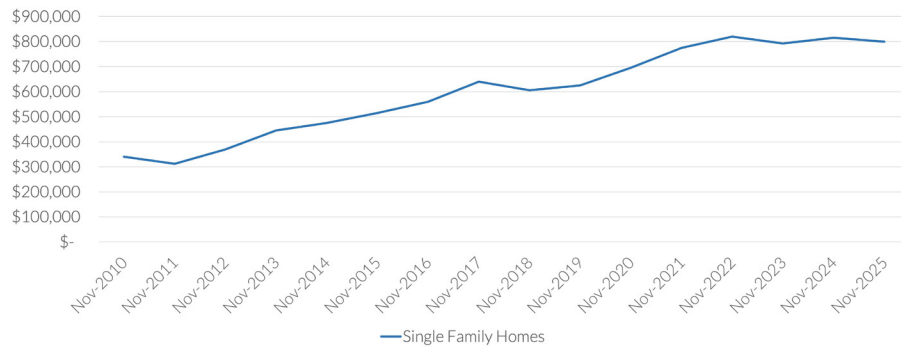
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YEAR-OVER-YEAR COMPARISONS

MEDIAN SALE PRICE

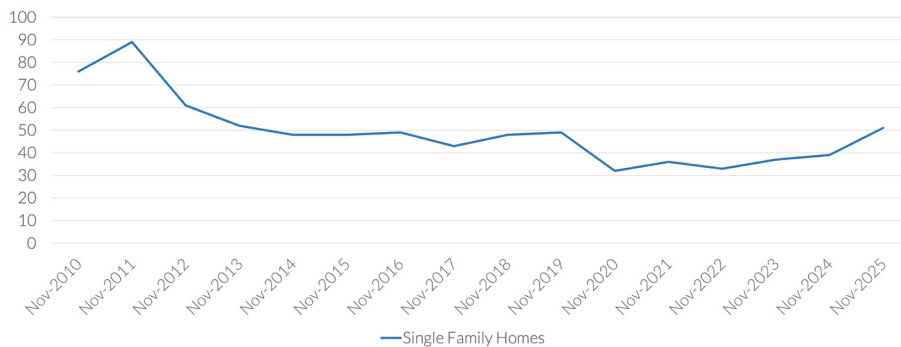


Single Family Residences

\$799,000

-2.0% change year-over-year

MEDIAN MARKET TIME

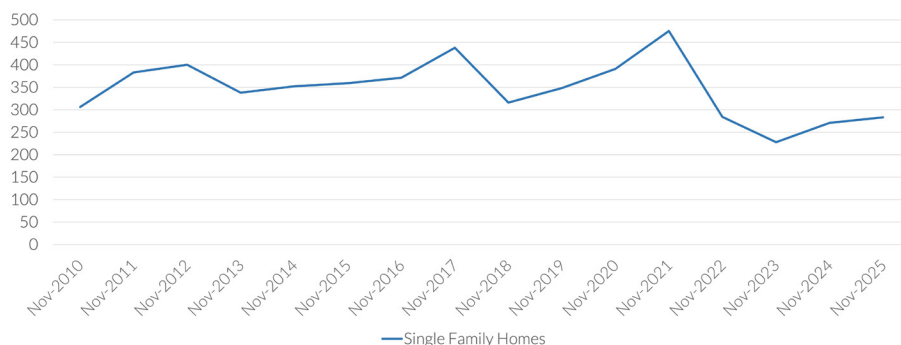


Single Family Residences

51 days

+12 day change year-over-year

NUMBER OF SALES



Single Family Residences

283

+4.4% change year-over-year