SONOMA COUNTY MARKET UPDATE

JUNE 2026

VANGUARD PROPERTIES

MARKET UPDATE

SONOMA COUNTY | JUNE 2026

Sonoma County's May housing market showed encouraging strength, led by tighter supply, faster sales, and stronger seller results. Available single family home inventory finished the month 17.3% lower than last year, while closed sales increased 9.5%, creating a more competitive environment for well-positioned listings.

That competition showed up clearly in the sale metrics. Nearly 40% of homes sold over list price, up 11.0% from last year, and sellers received an average of 100.2% of list price. Homes also moved faster, with median days on market falling by 3 days to 28 days.

Pricing was mixed, with the median sales price up 2.3% to $880,000 while the median price per square foot declined 3.3% to $529. However, these declines were measured, especially in the context of lower inventory, faster market times, more closed sales, and stronger over-asking activity.

The only softer activity metric was contract volume, which declined 11.8% year over year. But with inventory also meaningfully lower, this appears at least partly supply-driven. Buyers remain active, but they are selective, and the best-priced homes are still drawing strong attention.

The broader backdrop is also supportive. Mortgage rates remain elevated, but they are below where they were a year ago, easing some affordability pressure. The labor market remains steady nationally, and Sonoma County's unemployment rate has improved from last year, reinforcing local economic stability.

Overall, May points to a Sonoma County market that is resilient, competitive, and healthier than the headline price changes alone might suggest. Inventory is tighter, homes are selling faster, closed sales are up, and well-positioned listings continue to command strong results.

SINGLE FAMILY HOMES

MAY 2026

Median Sales Price	$880,000 ↑
Days on market	28 ↓
$ / SQ. FT.	$529 ↓
# For Sale On Last Day Of Month	891 ↓
Went Into Contract	345 ↓
Properties Sold	357 ↑

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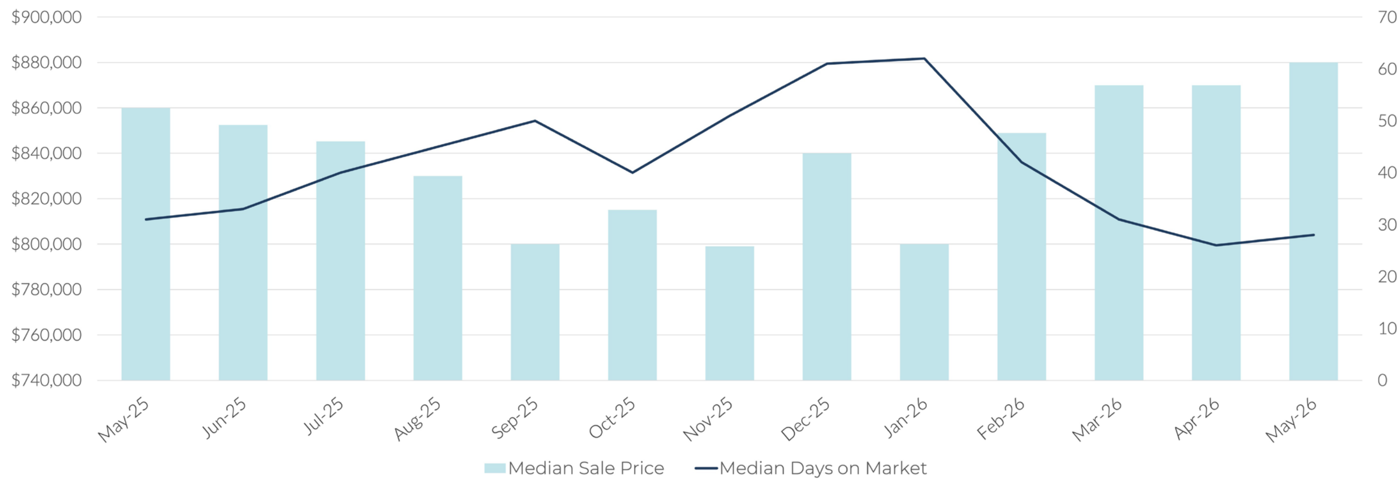
SINGLE FAMILY RESIDENCES

MONTH-OVER-MONTH COMPARISON



CHANGE IN PAST MONTH: SALES PRICE: +1.1% DAYS ON MARKET: **+2 days**

YEAR-OVER-YEAR COMPARISON

"Sonoma County's May housing market showed encouraging strength, led by tighter supply, faster sales, and stronger seller results."

MEDIAN

	MAY 2026	MAY 2025	%Δ
Sales Price	$880,000	$860,000	+2.3%
Days On Market	28	31	-9.7%
$ / SQ. FT.	$529	$547	-3.3%

TOTAL

	MAY 2026	MAY 2025	%Δ
Went Into Contract	345	391	-11.8%
Properties Sold	357	326	+9.5%
# For Sale Last Day of Month	891	1,077	-17.3%
% Of Properties Sold Over List	39.5%	35.6%	+11.0%
% Of List Price Received *(Average)*	100.2%	99.7%	+0.5%

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YEAR-OVER-YEAR REGION COMPARISON

REGION	HOMES SOLD (TOTAL)			DAYS ON MARKET (MEDIAN)			SALE PRICE (MEDIAN)		
	Q1 2026	Q1 2025	%Δ	Q1 2026	Q1 2025	%Δ	Q1 2026	Q1 2025	%Δ
Bodega Bay	7*	9*	▼ 22%	275	29	▲ 848%	$2,432,500	$1,527,500	▲ 59%
Cazadero	7*	1*	▲ 600%	62	146	▼ 58%	$555,000	$200,000	▲ 178%
Cloverdale	16*	23*	▼ 30%	47	44	▲ 7%	$656,500	$635,000	▲ 3%
Cotati	12*	8*	▲ 50%	26	16	▲ 63%	$923,250	$660,000	▲ 40%
Forestville	5*	7*	▼ 29%	24	42	▼ 43%	$1,350,000	$603,340	▲ 124%
Geyserville	3*	4*	▼ 25%	245	69	▲ 255%	$1,310,000	$2,262,500	▼ 42%
Glen Ellen	8*	5*	▲ 60%	61	27	▲ 126%	$887,500	$1,310,000	▼ 32%
Guerneville	17*	12*	▲ 42%	109	28	▲ 289%	$450,000	$530,500	▼ 15%
Healdsburg	32*	33*	▼ 3%	83	37	▲ 124%	$979,975	$1,247,000	▼ 21%
Jenner	0	1*	▼ 100%	-	24	-	-	$650,000	-
Kenwood	4*	2*	▲ 100%	17	141	▲ 88%	$791,000	$1,275,000	▼ 38%
Monte Rio	3*	3*	0%	61	141	▲ 57%	$576,770	$700,000	▼ 18%
Occidental	4*	2*	▲ 100%	52	75	▲ 31%	$1,165,000	$1,262,500	▼ 8%
Penngrove	4*	6*	▼ 33%	122	48	▲ 154%	$2,115,000	$1,282,500	▲ 65%
Petaluma	75	95*	▼ 21%	25	27	▼ 7%	$1,050,000	$1,030,000	▲ 2%
Rohnert Park	50	54*	▼ 7%	29	35	▼ 17%	$767,000	$795,000	▼ 4%
Santa Rosa	273	239	▲ 14%	44	34	▲ 29%	$750,000	$775,000	▼ 3%
Sebastopol	36*	27*	▲ 33%	27	32	▼ 16%	$1,200,000	$1,100,000	▲ 9%
Sonoma	60	47*	▲ 28%	39	27	▲ 44%	$1,000,000	$930,000	▲ 8%
Windsor	27*	54	▼ 50%	23	35	▼ 34%	$869,000	$816,785	▲ 6%
SONOMA COUNTY	664	650	▲ 2%	40	33	▲ 21%	$835,000	$840,000	▼ 1%

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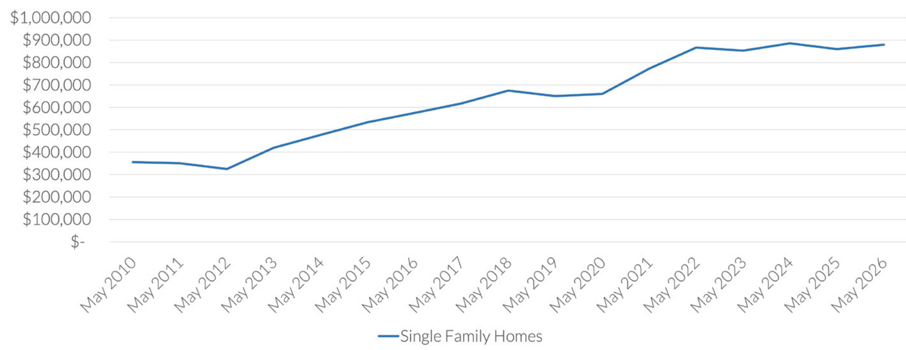
YEAR-OVER-YEAR COMPARISONS

MEDIAN SALE PRICE

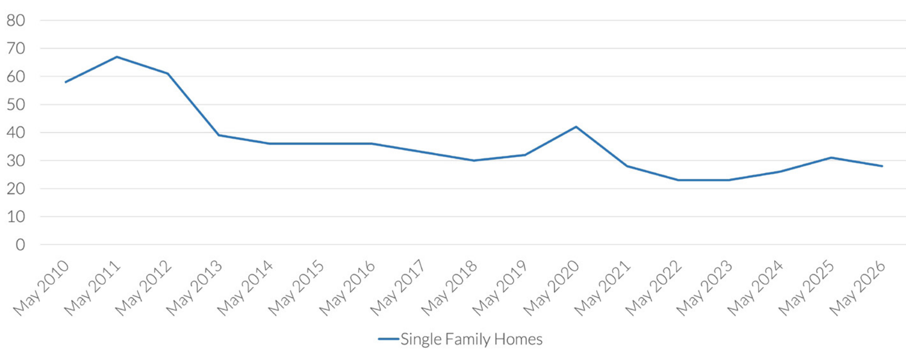


Single Family Residences

$880,000

+2.3% change year-over-year

MEDIAN MARKET TIME

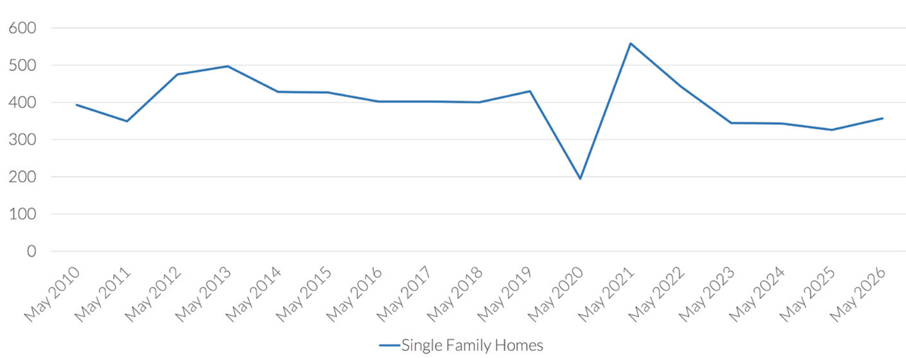


Single Family Residences

28 days

-3 day change year-over-year

NUMBER OF SALES



Single Family Residences

357

+9.5% change year-over-year

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