



# SONOMA COUNTY MARKET UPDATE

MARCH 2026





## VANGUARD PROPERTIES

# MARKET UPDATE

SONOMA COUNTY | MARCH 2026

The Sonoma County housing market is showing signs of renewed activity heading into the spring season, with demand picking up even as inventory remains tight and pricing holds steady. While homes are taking longer to sell and bidding wars have cooled, the overall market is functioning in a more balanced and sustainable way.

The most notable shift year over year is the increase in buyer engagement against a backdrop of declining supply. The number of homes going into contract rose 11.9% and closed sales increased 1.8%, even as inventory dropped 14.2%. In other words, more buyers are competing for fewer homes, reinforcing the supply-demand imbalance that continues to support pricing.

Pricing remains highly resilient. The median sales price held essentially flat at \$849,000, down just 0.1%, while price per square foot increased 0.8% to \$502. Sellers are still achieving strong results, receiving 99.4% of their list price on average.

Altogether, Sonoma County is entering the spring season from a position of strength. Demand is building, supply remains constrained, and values are holding steady.



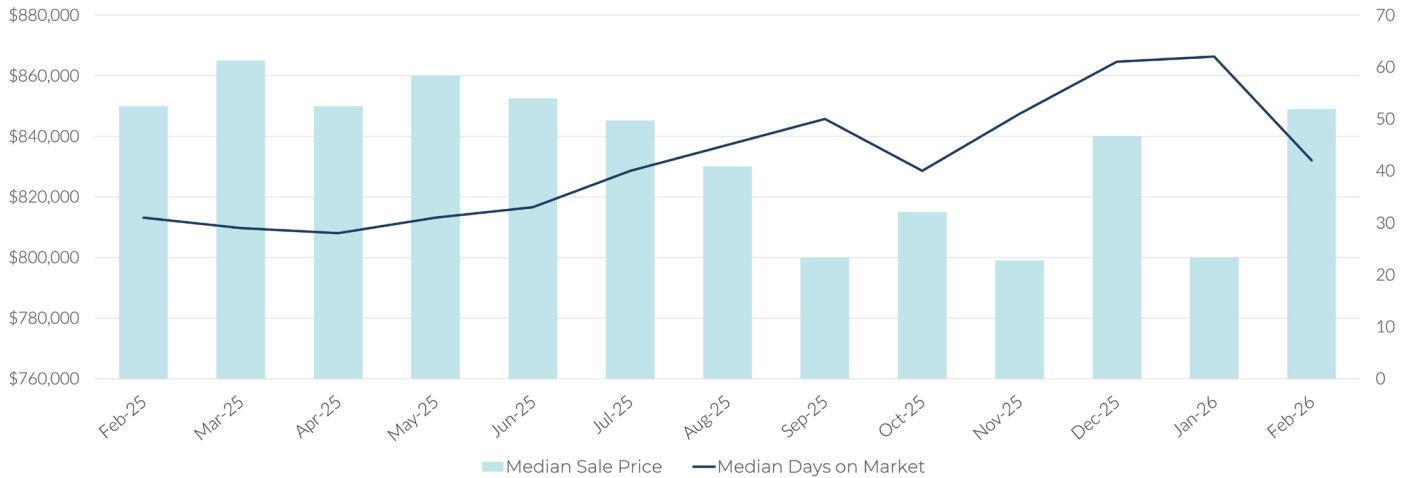
### SINGLE FAMILY HOMES

#### FEBRUARY 2026

Median Sales Price	\$849,000 ↓
Days on market	42 ↑
\$/SQ. FT.	\$502 ↑
# For Sale On Last Day Of Month	536 ↓
Went Into Contract	253 ↑
Properties Sold	221 ↑

## SINGLE FAMILY RESIDENCES

### MONTH-OVER-MONTH COMPARISON



CHANGE IN PAST MONTH:

SALES PRICE: **+6.1%**

DAYS ON MARKET: **-20 days**

### YEAR-OVER-YEAR COMPARISON

*“Sonoma County is entering the spring season from a position of strength. Demand is building, supply remains constrained, and values are holding steady.”*

	MEDIAN		
	FEB-2026	FEB-2025	%Δ
Sales Price	\$849,000	\$850,000	-0.1%
Days On Market	42	31	+35.5%
\$ / SQ. FT.	\$502	\$498	+0.8%

	TOTAL		
	FEB-2026	FEB-2025	%Δ
Went Into Contract	253	226	+11.9%
Properties Sold	221	217	+1.8%
# For Sale Last Day of Month	536	625	-14.2%
% Of Properties Sold Over List	29.9%	35.5%	-15.8%
% Of List Price Received <i>(Average)</i>	99.4%	99.6%	-0.2%

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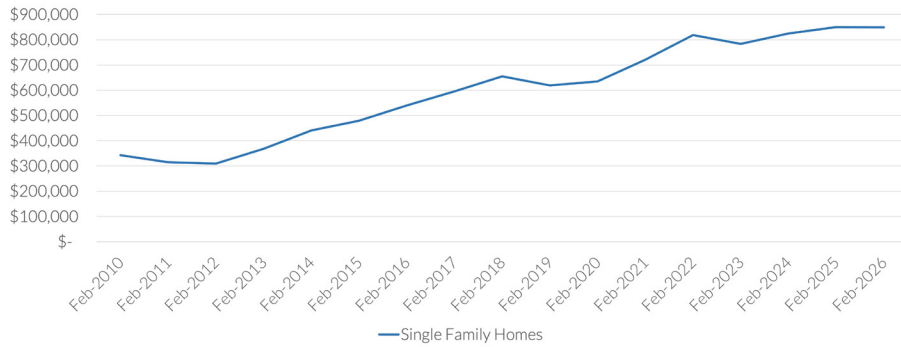
MARCH 2026

## YEAR-OVER-YEAR REGION COMPARISON

REGION	HOMES SOLD (TOTAL)			DAYS ON MARKET (MEDIAN)			SALE PRICE (MEDIAN)		
	2025	2024	%Δ	2025	2024	%Δ	2025	2024	%Δ
Bodega Bay	43*	43*	0%	34	45	▼ 24%	\$1,405,000	\$1,350,000	▲ 4%
Cazadero	28*	20*	▲ 40%	43	36	▲ 19%	\$560,815	\$622,000	▼ 10%
Cloverdale	90	96	▼ 6%	52	43	▲ 21%	\$632,500	\$649,500	▼ 3%
Cotati	48*	45*	▲ 7%	21	31	▼ 32%	\$803,000	\$850,000	▼ 6%
Forestville	61	62	▼ 2%	61	37	▲ 65%	\$632,500	\$625,000	▲ 1%
Geyserville	12*	10*	▲ 20%	106	63	▲ 68%	\$1,520,000	\$938,500	▲ 62%
Glen Ellen	31*	40*	▼ 23%	45	64	▼ 30%	\$1,327,000	\$1,250,000	▲ 6%
Guerneville	104	85	▲ 22%	52	44	▲ 18%	\$546,000	\$579,000	▼ 6%
Healdsburg	177	149	▲ 19%	48	47	▲ 2%	\$1,175,000	\$1,225,000	▼ 4%
Jenner	10*	9*	▲ 11%	36	34	▲ 6%	\$857,500	\$870,000	▼ 1%
Kenwood	23*	18*	▲ 28%	72	38	▲ 89%	\$1,800,000	\$1,575,000	▲ 14%
Monte Rio	18*	39*	▼ 54%	44	35	▲ 26%	\$532,500	\$500,000	▲ 7%
Occidental	22*	12*	▲ 83%	47	26	▲ 81%	\$1,283,950	\$1,322,500	▼ 3%
Penngrove	38*	24*	▲ 58%	33	20	▲ 65%	\$1,345,000	\$1,306,250	▲ 3%
Petaluma	485	448	▲ 8%	28	27	▲ 4%	\$952,009	\$944,950	▲ 1%
Rohnert Park	300	278	▲ 8%	35	27	▲ 30%	\$758,000	\$772,000	▼ 2%
Santa Rosa	1,420	1,389	▲ 2%	40	32	▲ 25%	\$760,000	\$775,000	▼ 2%
Sebastopol	201	192	▲ 5%	36	30	▲ 20%	\$1,211,000	\$1,107,500	▲ 9%
Sonoma	319	301	▲ 6%	53	38	▲ 39%	\$1,100,000	\$1,050,000	▲ 5%
Windsor	226	216	▲ 5%	36	27	▲ 33%	\$825,000	\$827,638	▼ 0%
<b>SONOMA COUNTY</b>	<b>3,743</b>	<b>3,585</b>	<b>▲ 4%</b>	<b>39</b>	<b>32</b>	<b>▲ 22%</b>	<b>\$836,000</b>	<b>\$839,464</b>	<b>▼ 0%</b>

## YEAR-OVER-YEAR COMPARISONS

### MEDIAN SALE PRICE

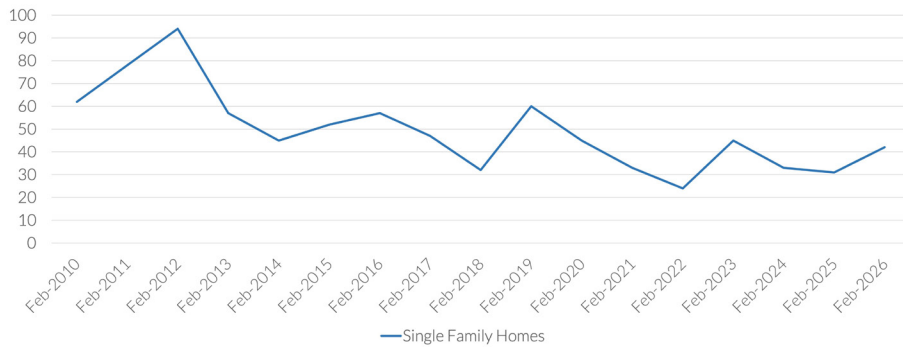


Single Family Residences

**\$849,000**

-0.1% change year-over-year

### MEDIAN MARKET TIME

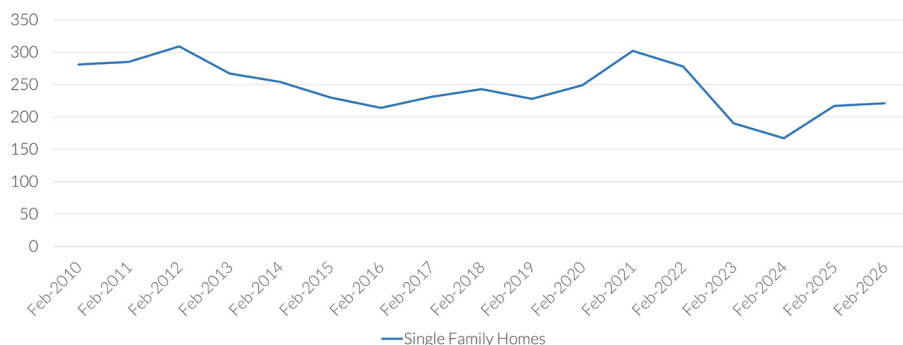


Single Family Residences

**42 days**

+11 day change year-over-year

### NUMBER OF SALES



Single Family Residences

**221**

+1.8% change year-over-year