



SONOMA COUNTY MARKET UPDATE

MAY 2026





VANGUARD PROPERTIES

MARKET UPDATE

SONOMA COUNTY | MAY 2026

Sonoma County’s spring market moved decisively higher in April, with sales activity strengthening, inventory tightening, and pricing continuing to edge upward. The clearest story is demand. Closed sales rose 14.6% year over year, while the number of homes going into contract increased 8.0%. At the same time, available inventory fell 16.3%, leaving buyers with fewer choices just as more of them stepped back into the market.

That supply and demand imbalance is showing up in stronger seller results. More than 40% of homes sold over list price in April, up from 39.2% last year, and sellers received an average of 100.6% of list price. Homes also moved faster, with median days on market falling from 28 days to 26 days.

Pricing continues to firm. The median sale price increased 2.4% year over year to \$870,000, while the median price per square foot rose 2.9% to \$540. These are not dramatic price jumps, but they are meaningful in context. Sonoma County is showing steady appreciation alongside faster sales and a smaller pool of available homes.

The broader economic backdrop is also helping support buyer confidence. Mortgage rates remain a key affordability factor, but Freddie Mac’s latest reading shows the 30 year fixed rate still below where it was one year ago, even after a recent move higher. At the same time, the national labor market continues to add jobs, and April delivered a strong month for equities, with the S&P 500 posting its best monthly performance since 2020 and the Nasdaq reaching a new record high.

Overall, April points to a Sonoma County market that is gaining strength at the start of the spring season. Buyer activity is up, inventory is down, homes are selling faster, and pricing is moving in the right direction. The market is not overheated, but it is competitive, and well positioned listings are continuing to command strong results.



SINGLE FAMILY HOMES

APRIL 2026

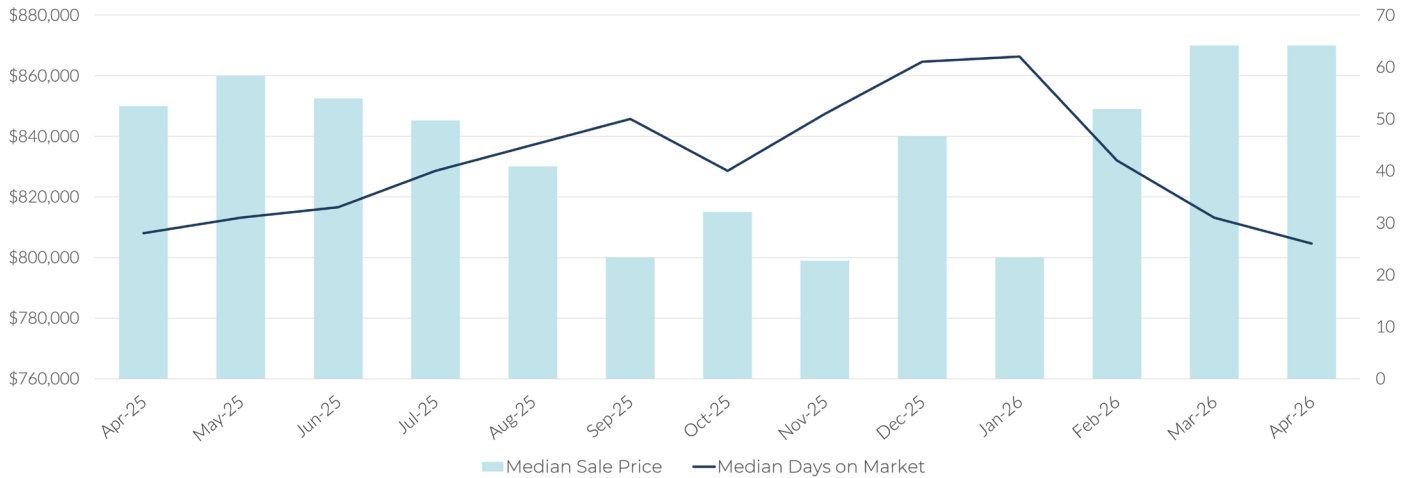
Median Sales Price	\$870,000 ↑
Days on market	26 ↓
\$ / SQ. FT.	\$540 ↑
# For Sale On Last Day Of Month	798 ↓
Went Into Contract	365 ↑
Properties Sold	377 ↑

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MAY 2026

SINGLE FAMILY RESIDENCES

MONTH-OVER-MONTH COMPARISON



CHANGE IN PAST MONTH:

SALES PRICE: No change

DAYS ON MARKET: **-5 days**

YEAR-OVER-YEAR COMPARISON

"April points to a Sonoma County market that is gaining strength at the start of the spring season. Buyer activity is up, inventory is down, homes are selling faster, and pricing is moving in the right direction."

	MEDIAN		
	APR-2026	APR-2025	%Δ
Sales Price	\$870,000	\$850,000	+2.4%
Days On Market	26	28	-7.1%
\$/SQ. FT.	\$540	\$525	+2.9%

	TOTAL		
	APR-2026	APR-2025	%Δ
Went Into Contract	365	338	+8.0%
Properties Sold	377	329	+14.6%
# For Sale Last Day of Month	798	953	-16.3%
% Of Properties Sold Over List	40.8%	39.2%	+4.1%
% Of List Price Received (Average)	100.6%	100.3%	+0.3%

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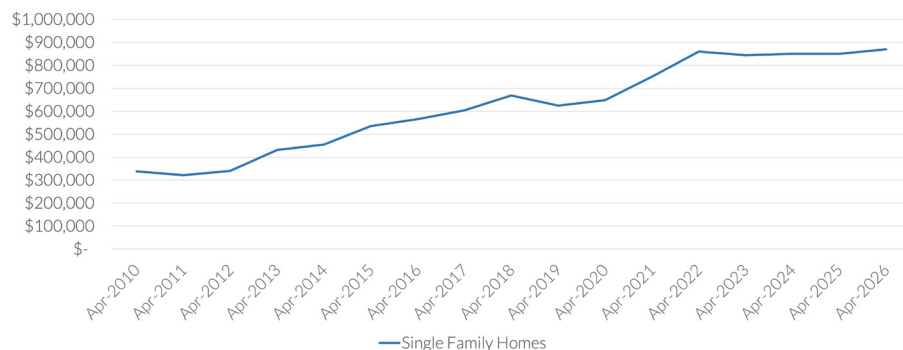
YEAR-OVER-YEAR REGION COMPARISON

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%
Penngrrove	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%

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. ©2026 Vanguard Properties. All rights reserved. Equal Housing Opportunity, DRE No. 01486075

YEAR-OVER-YEAR COMPARISONS

MEDIAN SALE PRICE

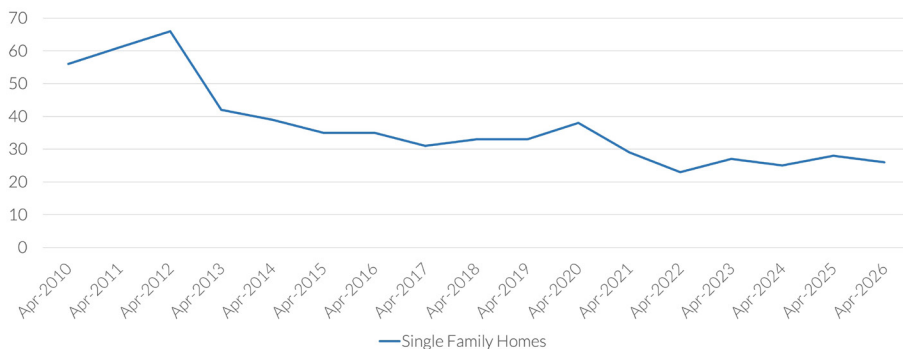


Single Family Residences

\$870,000

+2.4% change year-over-year

MEDIAN MARKET TIME

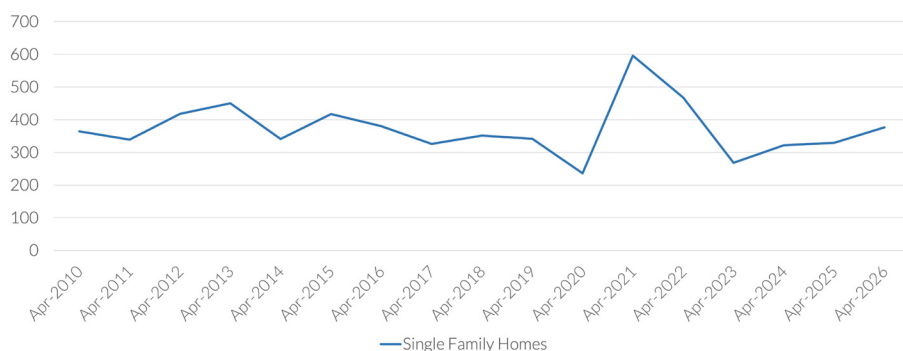


Single Family Residences

26 days

-2 day change year-over-year

NUMBER OF SALES



Single Family Residences

377

+14.6% change year-over-year