



SONOMA COUNTY MARKET UPDATE

Q3 2026





VANGUARD PROPERTIES

MARKET UPDATE

SONOMA COUNTY | Q3 2026

Sonoma County's single-family housing market recorded a 26.3% increase in the share of homes selling above asking in Q3 2026, with 36.0% closing above list price compared with 28.5% in Q3 2025. Median market time fell 17.8% to 37 days, eight days faster than a year earlier, while sellers received an average of 100.9% of asking price, up from 98.9%. Together, these improvements point to stronger selling results, with homes that found buyers moving more quickly and achieving better prices relative to asking.

Available inventory declined 10.7%, ending September with 905 homes for sale, or 108 fewer options than a year earlier. Closed sales decreased 5.5% to 1,036, while the number of homes entering contract fell 8.2% to 995. This combination suggests a market where reduced selection may be helping sustain competition, even as overall transaction activity remains subdued. For sellers, fewer competing listings can be an advantage, but the softer contract volume reinforces the importance of thoughtful pricing and presentation.

Pricing remained resilient. Median price per square foot increased 3.4% to \$522, while the median sales price edged up 0.2% to \$830,000. September's monthly median rebounded following August's dip, and the longer-term data show quarterly prices holding near the elevated levels of recent years. Santa Rosa, the county's largest market by sales volume, offered a particularly useful example of this stability: sales were nearly unchanged at 404 versus 405, the median price rose 2.0% to \$770,000, and median market time shortened 21.7% to 36 days. Results varied across communities, underscoring the value of evaluating each home against its immediate competition.

Recent economic releases provide a supportive backdrop. The Bureau of Economic Analysis reported on September 30 that the U.S. economy expanded at a 2.2% annualized rate in the second quarter, supported by consumer spending, investment and exports. Locally, preliminary Bureau of Labor Statistics figures show Santa Rosa-Petaluma nonfarm employment increased 0.8% year over year in August, including gains of 3.2% in education and health services and 1.9% in leisure and hospitality. That continued job growth offers a measure of support for household incomes and housing demand as Sonoma County enters the final quarter of the year.



SINGLE FAMILY HOMES

Q3 2026

Median Sales Price	\$830,000 ↑
Days on market	37 ↓
\$ / SQ. FT.	\$522 ↑
# For Sale On Last Day Of Quarter	905 ↓
Went Into Contract	995 ↓
Properties Sold	1,036 ↓

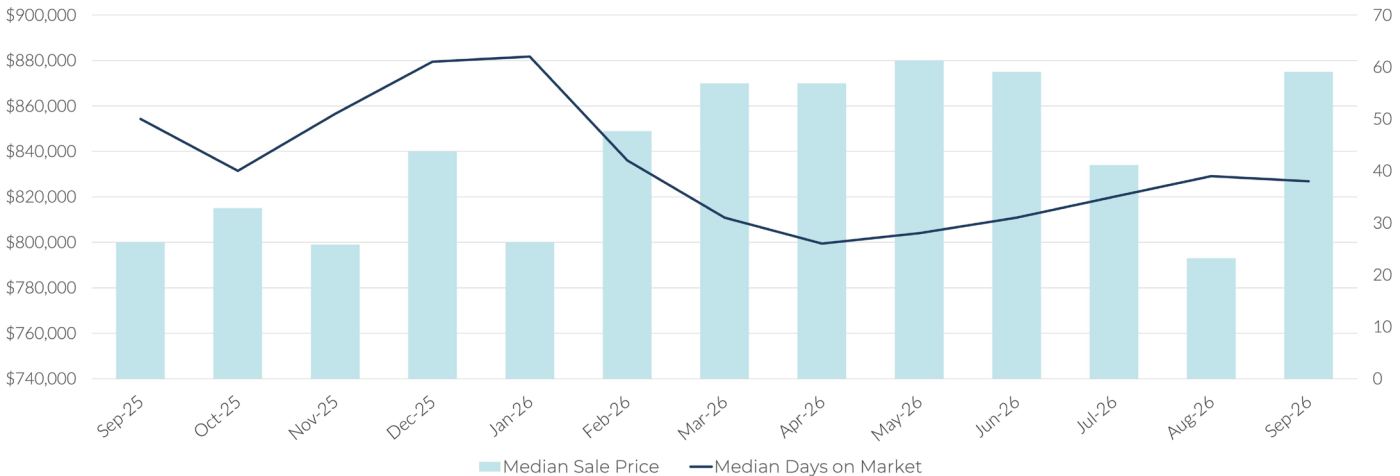


SONOMA COUNTY MARKET UPDATE

Q3 2026

SINGLE FAMILY RESIDENCES

MONTH-OVER-MONTH COMPARISON



CHANGE IN PAST MONTH:

SALES PRICE: **+10.3%**

DAYS ON MARKET: **-1 day**

YEAR-OVER-YEAR COMPARISON

"Sonoma County's single-family housing market recorded a 26.3% increase in the share of homes selling above asking in Q3 2026, with 36.0% closing above list price compared with 28.5% in Q3 2025."

	MEDIAN		
	Q3-2026	Q3-2025	%Δ
Sales Price	\$830,000	\$828,280	+0.2%
Days On Market	37	45	-17.8%
\$ / SQ. FT.	\$522	\$505	+3.4%

	TOTAL		
	Q3-2026	Q3-2025	%Δ
Went Into Contract	995	1,084	-8.2%
Properties Sold	1,036	1,096	-5.5%
# For Sale Last Day of Quarter	905	1,013	-10.7%
% Of Properties Sold Over List	36.0%	28.5%	+26.3%
% Of List Price Received (Average)	100.9%	98.9%	+2.0%

SONOMA COUNTY MARKET UPDATE

SEPTEMBER 2026

YEAR-OVER-YEAR REGION COMPARISON

REGION	HOMES SOLD (TOTAL)			DAYS ON MARKET (MEDIAN)			SALE PRICE (MEDIAN)		
	Q3 2026	Q3 2025	%Δ	Q3 2026	Q3 2025	%Δ	Q3 2026	Q3 2025	%Δ
Bodega Bay	14*	10*	▲ 40%	65	74	▼ 12%	\$1,637,500	\$1,219,500	▲ 34%
Cazadero	10*	9*	▲ 11%	57	53	▲ 8%	\$510,000	\$478,000	▲ 7%
Cloverdale	23*	27*	▼ 15%	37	84	▼ 56%	\$608,000	\$595,000	▲ 2%
Cotati	14*	16*	▼ 13%	30	21	▲ 43%	\$854,500	\$766,500	▲ 11%
Forestville	26*	26*	0%	26	62	▼ 58%	\$711,000	\$722,500	▼ 2%
Geyserville	4*	4*	0%	106	121	▼ 12%	\$1,090,000	\$1,065,000	▲ 2%
Glen Ellen	10*	6*	▲ 67%	87	45	▲ 93%	\$1,817,500	\$1,197,500	▲ 52%
Guerneville	41*	41*	0%	50	57	▼ 12%	\$558,000	\$515,000	▲ 8%
Healdsburg	46*	60	▼ 23%	46	54	▼ 15%	\$1,235,000	\$1,005,000	▲ 23%
Jenner	3*	3*	0%	63	35	▲ 80%	\$1,000,000	\$910,000	▲ 10%
Kenwood	7*	7*	0%	23	64	▼ 64%	\$1,849,000	\$1,388,000	▲ 33%
Monte Rio	11*	5*	▲ 120%	42	88	▼ 52%	\$460,000	\$585,000	▼ 21%
Occidental	8*	6*	▲ 33%	32	28	▲ 14%	\$860,000	\$1,117,500	▼ 23%
Penngrrove	8*	17*	▼ 53%	60	25	▲ 140%	\$1,257,500	\$1,351,000	▼ 7%
Petaluma	114	131	▼ 13%	25	31	▼ 19%	\$937,500	\$965,000	▼ 3%
Rohnert Park	64	83	▼ 23%	31	37	▼ 16%	\$755,000	\$749,000	▲ 1%
Santa Rosa	404	405	▼ 0%	36	46	▼ 22%	\$770,000	\$755,000	▲ 2%
Sebastopol	55	59	▼ 7%	39	35	▲ 11%	\$1,195,000	\$1,190,000	▲ 0%
Sonoma	97	97	0%	47	58	▼ 19%	\$945,000	\$1,130,000	▼ 16%
Windsor	51	64	▼ 20%	40	35	▲ 14%	\$860,000	\$817,500	▲ 5%
SONOMA COUNTY	1,036	1,096	▼ 5%	37	45	▼ 18%	\$830,000	\$828,280	▲ 0%

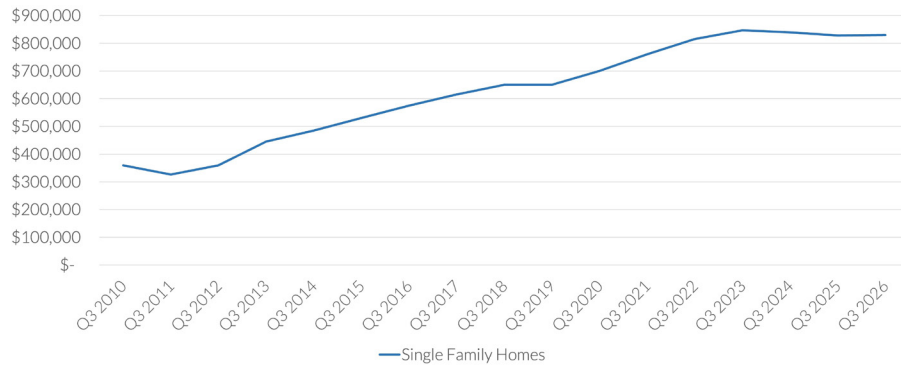
* Small sample size; Use caution when interpreting statistics. Sources: SFAR Super Regional MLS & BrokerMetrics. Property types covered: Single-family. Only property data posted on the MLS is covered. All information is deemed reliable, but not guaranteed for accuracy. All data is subject to errors, omissions, revisions, and is not warranted. ©2026 Vanguard Properties. All rights reserved. Equal Housing Opportunity. DRE No. 01486075

SONOMA COUNTY MARKET UPDATE

SEPTEMBER 2026

YEAR-OVER-YEAR COMPARISONS

MEDIAN SALE PRICE

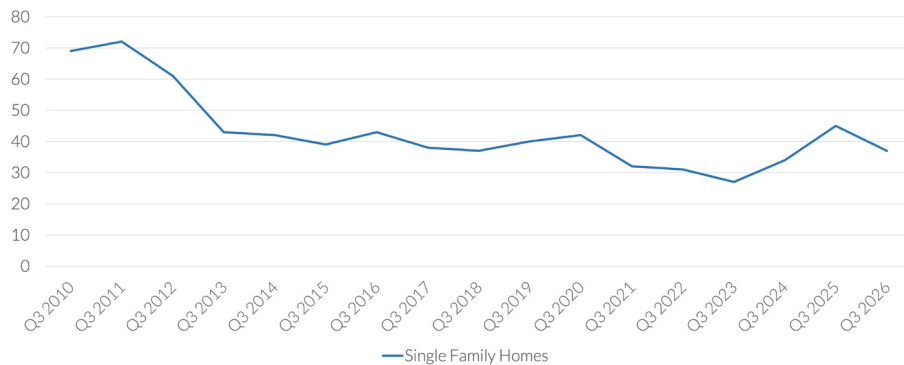


Single Family Residences

\$830,000

+0.2% change year-over-year

MEDIAN MARKET TIME

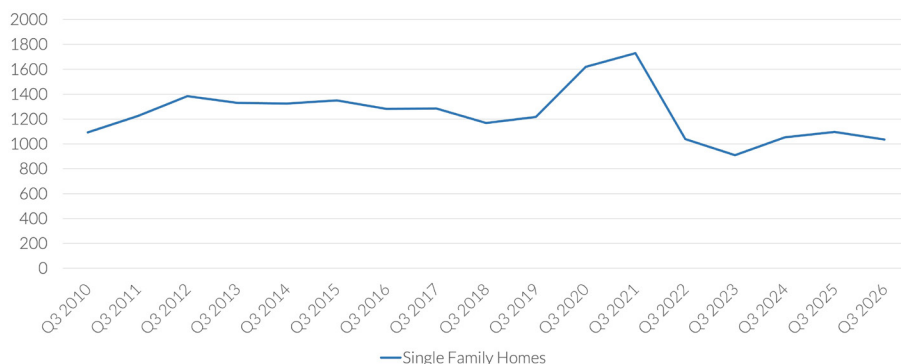


Single Family Residences

37 days

-8 day change year-over-year

NUMBER OF SALES



Single Family Residences

1,036

-5.5% change year-over-year