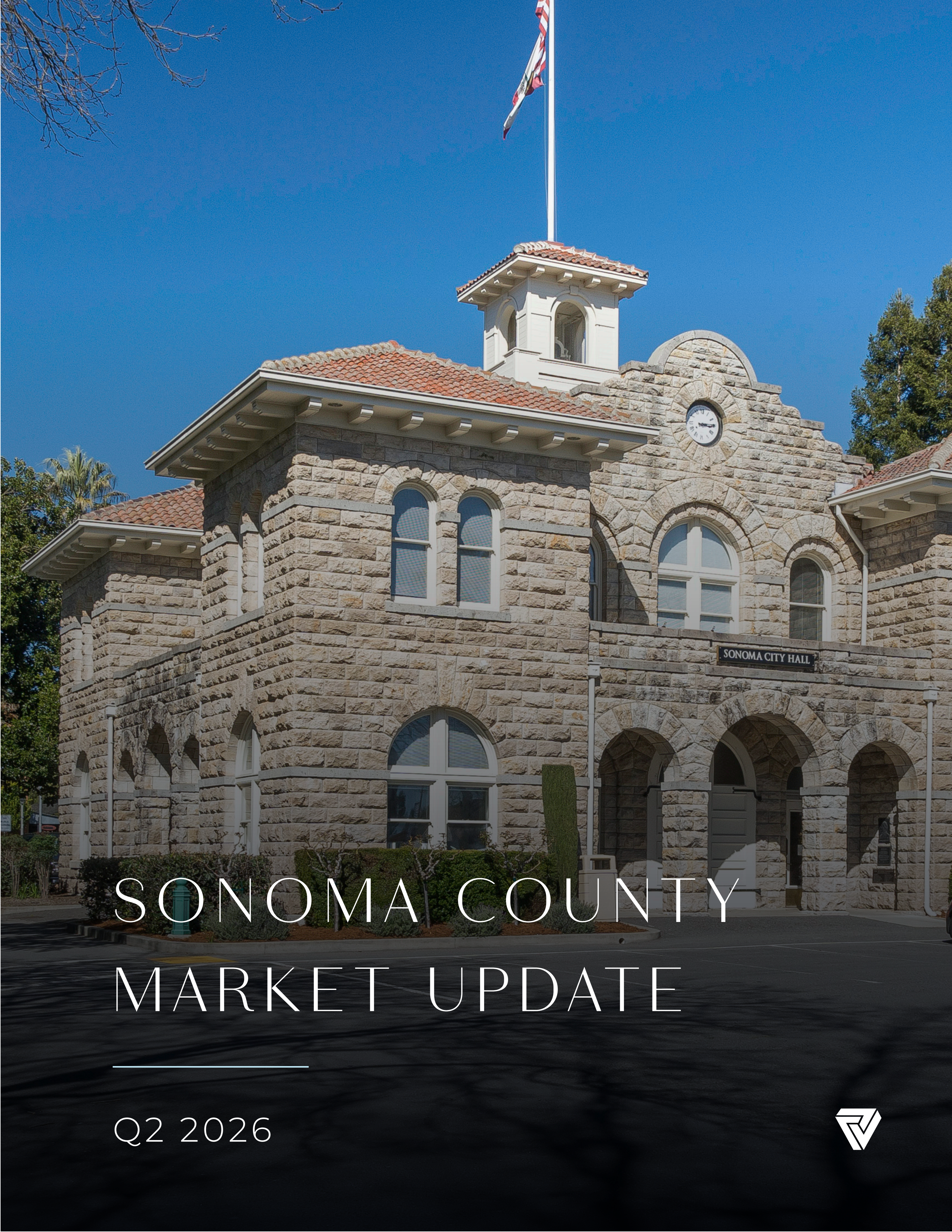


SONOMA COUNTY MARKET UPDATE

Q2 2026

VANGUARD PROPERTIES

MARKET UPDATE

SONOMA COUNTY | Q2 2026

Sonoma County's housing market strengthened in the second quarter, led by sharply tighter inventory, rising sales, faster market times, and stronger competition. Quarter-end inventory fell 19.0% to 891 homes, yet closed sales increased 6.6% to 1,121, the highest Q2 total since 2022.

The median sales price rose 2.3% to a new second-quarter high of $875,000, while homes sold three days faster, in a median of 28 days. Nearly 40% of properties sold above asking, up 7.0% from last year, and sellers received an average of 100.3% of list price.

The median price per square foot remained essentially stable, declining just 0.8% to $521. Contract activity dipped a modest 1.6%, but held up remarkably well considering the 19.0% reduction in available inventory. The gap between contracts and completed sales may also reflect transaction timing and sales occurring off market.

The broader backdrop offered additional encouragement. Mortgage rates remained below year-ago levels, Sonoma County unemployment improved to 3.7%, and June inflation cooled meaningfully, potentially creating a more supportive environment for housing demand.

Overall, Q2 reflected a resilient and increasingly competitive Sonoma County market. More homes sold despite substantially less inventory, prices reached a new Q2 high, and well-positioned listings continued to attract decisive buyers.

SINGLE FAMILY HOMES

Q2 2026

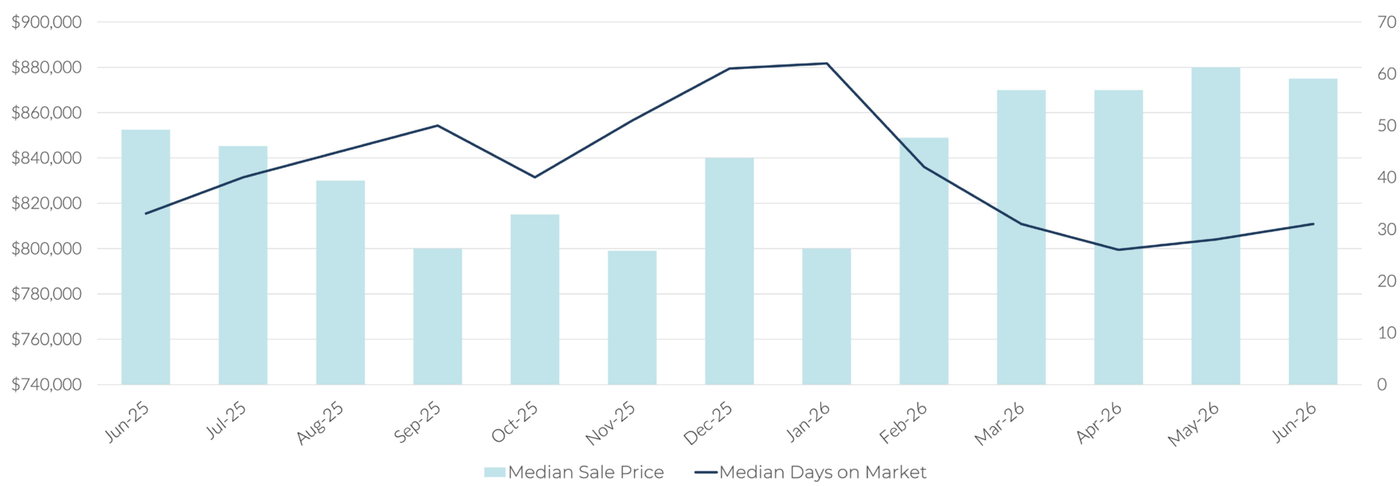
Median Sales Price	$875,000 ↑
Days on market	28 ↓
$ / SQ. FT.	$521 ↓
# For Sale On Last Day Of Quarter	891 ↓
Went Into Contract	1,089 ↓
Properties Sold	1,121 ↑

SONOMA COUNTY MARKET UPDATE

Q2 2026

SINGLE FAMILY RESIDENCES

MONTH-OVER-MONTH COMPARISON



CHANGE IN PAST MONTH: SALES PRICE: -0.6% DAYS ON MARKET: **+3 days**

YEAR-OVER-YEAR COMPARISON

"The median sales price rose 2.3% to a new second-quarter high of $875,000, while homes sold three days faster, in a median of 28 days. Nearly 40% of properties sold above asking, up 7.0% from last year, and sellers received an average of 100.3% of list price."

MEDIAN

	Q2 2026	Q2 2025	%Δ
Sales Price	$875,000	$855,000	+2.3%
Days On Market	28	31	-9.7%
$ / SQ. FT.	$521	$525	-0.8%

TOTAL

	Q2 2026	Q2 2025	%Δ
Went Into Contract	1,089	1,107	-1.6%
Properties Sold	1,121	1,052	+6.6%
# For Sale Last Day of Quarter	891	1,100	-19.0%
% Of Properties Sold Over List	39.5%	36.9%	+7.0%
% Of List Price Received *(Average)*	100.3%	100.0%	+0.3%

VANGUARD PROPERTIES

SONOMA COUNTY MARKET UPDATE

Q2 2026

YEAR-OVER-YEAR REGION COMPARISON

REGION	HOMES SOLD (TOTAL)			DAYS ON MARKET (MEDIAN)			SALE PRICE (MEDIAN)		
	Q2 2026	Q2 2025	%Δ	Q2 2026	Q2 2025	%Δ	Q2 2026	Q2 2025	%Δ
Bodega Bay	16*	13*	▲ 23%	55	25	▲ 120%	$1,775,000	$1,325,000	▲ 34%
Cazadero	4*	11*	▼ -64%	49	29	▲ 69%	$593,000	$620,000	▼ 4%
Cloverdale	24*	16*	▲ 50%	29	32	▼ 9%	$628,500	$655,000	▼ 4%
Cotati	11*	12*	▼ -8%	15	38	▼ 61%	$915,000	$826,000	▲ 11%
Forestville	24*	15*	▲ 60%	26	43	▼ 40%	$632,500	$632,500	0%
Geyserville	6*	3*	▲ 100%	82	112	▼ 27%	$987,000	$1,500,000	▼ 34%
Glen Ellen	13*	11*	▲ 18%	45	44	▲ 2%	$1,525,000	$1,400,000	▲ 9%
Guerneville	31*	30*	▲ 3%	30	34	▼ 12%	$555,000	$595,000	▼ 7%
Healdsburg	45*	47*	▼ -4%	43	34	▲ 26%	$1,330,000	$1,225,000	▲ 9%
Jenner	5*	3*	▲ 67%	26	37	▼ 30%	$1,232,000	$985,000	▲ 25%
Kenwood	9*	9*	0%	46	60	▼ 23%	$1,998,000	$2,000,000	▼ 0%
Monte Rio	6*	3*	▲ 100%	25	12	▲ 108%	$579,500	$705,000	▼ 18%
Occidental	6*	9*	▼ -33%	16	35	▼ 54%	$1,542,500	$1,400,000	▲ 10%
Penngrove	7*	5*	▲ 40%	28	31	▼ 10%	$1,507,000	$1,650,924	▼ 9%
Petaluma	141	144	▼ -2%	22	25	▼ 12%	$957,500	$956,000	▲ 0%
Rohnert Park	82	91	▼ -10%	29	26	▲ 12%	$772,000	$752,000	▲ 3%
Santa Rosa	417	413	▲ 1%	31	33	▼ 6%	$780,000	$793,000	▼ 2%
Sebastopol	65	60	▲ 8%	21	17	▲ 24%	$1,150,000	$1,377,500	▼ 17%
Sonoma	114	79	▲ 44%	36	35	▲ 3%	$1,249,000	$1,200,000	▲ 4%
Windsor	67	63	▲ 6%	28	31	▼ 10%	$826,000	$840,000	▼ 2%
SONOMA COUNTY	**1,121**	**1,052**	**▲ 7%**	**28**	**31**	**▼ 10%**	**$875,000**	**$855,000**	**▲ 2%**

** 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.*

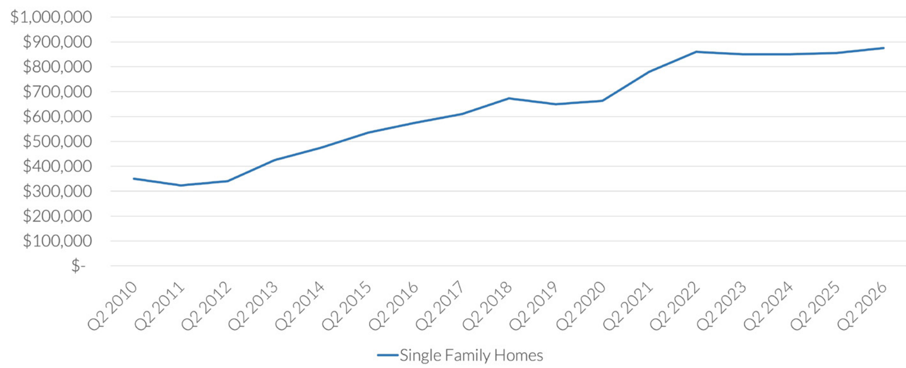
VANGUARD PROPERTIES

SONOMA COUNTY MARKET UPDATE

Q2 2026

YEAR-OVER-YEAR COMPARISONS

MEDIAN SALE PRICE

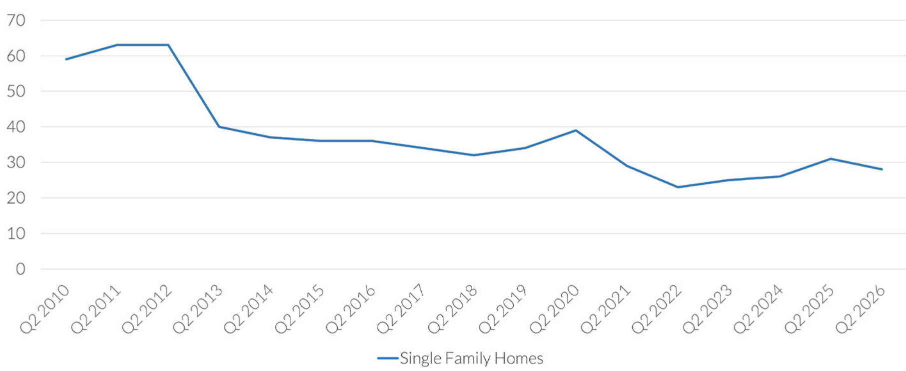


Single Family Residences

$875,000

+2.3% change year-over-year

MEDIAN MARKET TIME

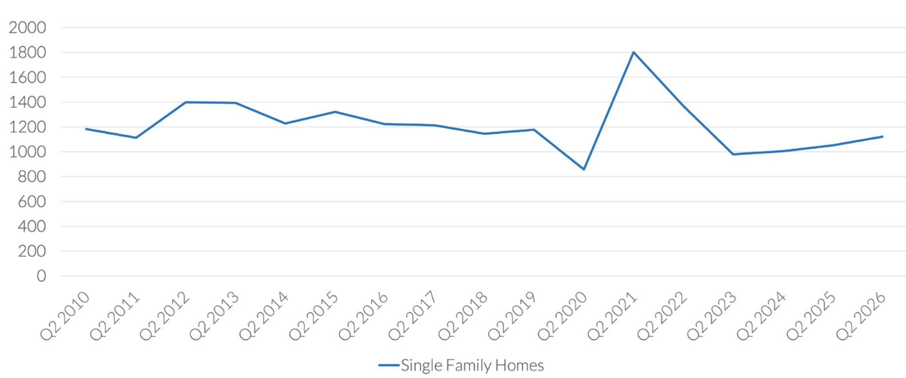


Single Family Residences

28 days

-3 day change year-over-year

NUMBER OF SALES



Single Family Residences

1,121

+6.6% change year-over-year

VANGUARD PROPERTIES