SONOMA COUNTY MARKET UPDATE

SEPTEMBER 2026

VANGUARD PROPERTIES

MARKET UPDATE

SONOMA COUNTY | SEPTEMBER 2026

Sonoma County's single-family housing market showed encouraging signs of competition in August, even as fewer homes changed hands. The share selling above asking rose 13.6% compared with August 2025 to 31.7%, representing nearly one in three sales. Median market time shortened 13.3% to 39 days, a six-day improvement, while sellers received an average of 99.7% of list price, up from 98.9%. Together, these measures point to stronger selling results for homes finding a buyer.

Available inventory was also notably lower. August ended with 885 homes for sale, down 11.9%, leaving buyers with 119 fewer options than a year earlier. Closed sales declined 7.8% to 344, while the number of homes entering contract fell 13.7% to 322. Reduced selection may be helping sustain competition, although the pullback in contract activity suggests that buyers remain selective. Thoughtful pricing remains especially important in a market where fewer transactions coexist with stronger results relative to asking prices.

Pricing offered a more nuanced picture. The median sales price declined 4.5% to $793,000, while median price per square foot edged up 0.8% to $511. That divergence suggests the mix of properties sold may account for part of the median price decline, though it does not establish how individual home values changed. The monthly chart also shows an easing from spring, with prices retreating and market times lengthening. Even so, August's faster sales pace and larger share of above-asking closings compared with last year suggest that competition remains an important part of the market.

Recent employment data provide additional encouragement. Preliminary figures show Santa Rosa–Petaluma nonfarm employment increased 0.8% in August from a year earlier, including gains of 3.2% in education and health services and 1.9% in leisure and hospitality. U.S. Bureau of Labor Statistics. Borrowing costs remain a consideration: the average 30-year fixed mortgage rate reached 6.95% on September 17, up from 6.76% the previous week. Freddie Mac. Continued local job growth nevertheless offers support for household incomes as buyers and sellers head into the fall market.

SINGLE FAMILY HOMES

AUGUST 2026

Median Sales Price	$793,000 ↓
Days on market	39 ↓
$ / SQ. FT.	$511 ↑
# For Sale On Last Day Of Month	885 ↓
Went Into Contract	322 ↓
Properties Sold	344 ↓

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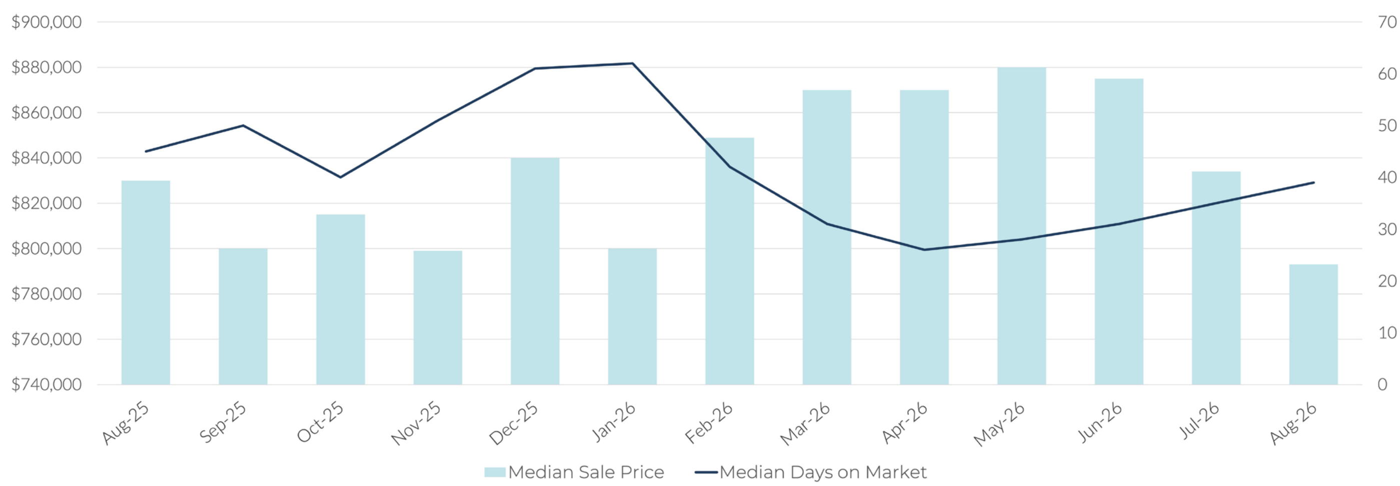
SINGLE FAMILY RESIDENCES

MONTH-OVER-MONTH COMPARISON



CHANGE IN PAST MONTH: SALES PRICE: -4.9% DAYS ON MARKET: +4 days

YEAR-OVER-YEAR COMPARISON

"The share selling above asking rose 13.6% compared with August 2025 to 31.7%, representing nearly one in three sales. Median market time shortened 13.3% to 39 days, a six-day improvement, while sellers received an average of 99.7% of list price..."

MEDIAN

	AUG-2026	AUG-2025	%Δ
Sales Price	$793,000	$830,000	-4.5%
Days On Market	39	45	-13.3%
$ / SQ. FT.	$511	$507	+0.8%

TOTAL

	AUG-2026	AUG-2025	%Δ
Went Into Contract	322	373	-13.7%
Properties Sold	344	373	-7.8%
# For Sale Last Day of Month	885	1,004	-11.9%
% Of Properties Sold Over List	31.7%	27.9%	+13.6%
% Of List Price Received (Average)	99.7%	98.9%	+0.8%

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. Equal Housing Opportunity. DRE No. 01486075

VANGUARD PROPERTIES

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YEAR-OVER-YEAR REGION COMPARISON

REGION	HOMES SOLD (TOTAL) Q2 2026	HOMES SOLD (TOTAL) Q2 2025	HOMES SOLD %Δ	DAYS ON MARKET (MEDIAN) Q2 2026	DAYS ON MARKET (MEDIAN) Q2 2025	DAYS ON MARKET %Δ	SALE PRICE (MEDIAN) Q2 2026	SALE PRICE (MEDIAN) Q2 2025	SALE PRICE %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.*

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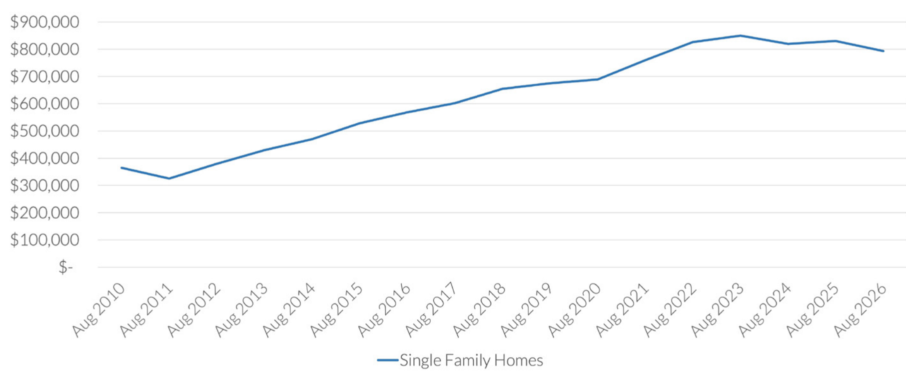
YEAR-OVER-YEAR COMPARISONS

MEDIAN SALE PRICE

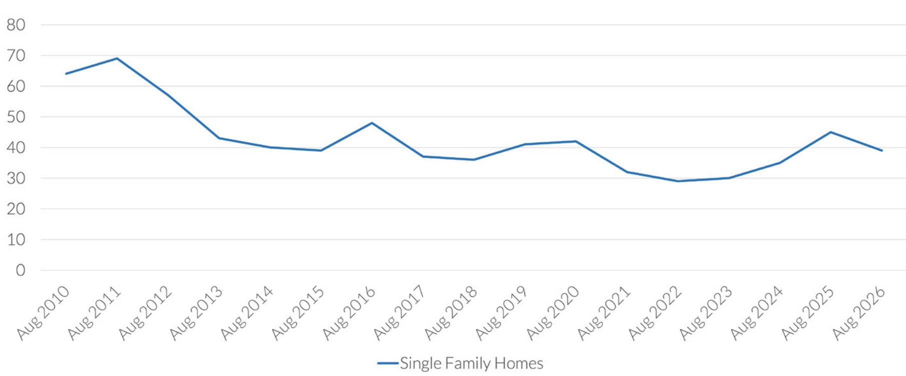


Single Family Residences

$793,000

-4.5% change year-over-year

MEDIAN MARKET TIME

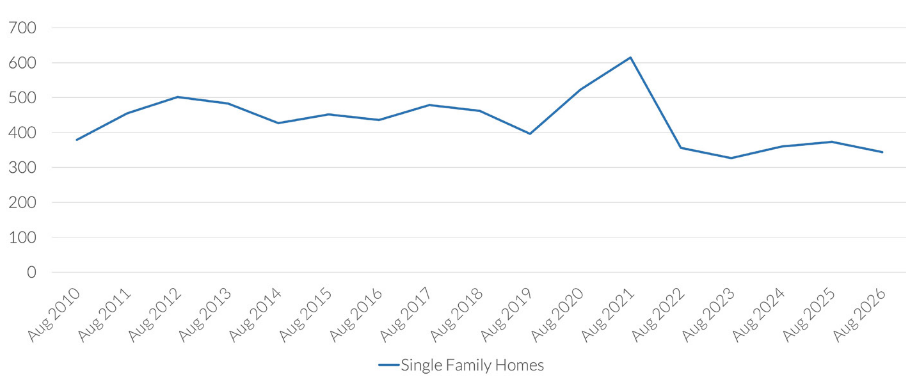


Single Family Residences

39 days

-6 day change year-over-year

NUMBER OF SALES



Single Family Residences

344

-7.8% change year-over-year

VANGUARD PROPERTIES