

SONOMA COUNTY MARKET UPDATE

FEBRUARY 2026





VANGUARD PROPERTIES

MARKET UPDATE

SONOMA COUNTY | FEBRUARY 2026

The Sonoma County housing market is starting 2026 from a position of stability, with pricing holding firm and activity settling into a more sustainable pace. While competition has cooled from prior years, demand remains present and the market is functioning more predictably.

The most striking shift year-over-year is the drop in competitive bidding: only 18.7% of homes sold above asking, down from roughly one-third last year. This decline in over-list sales means buyers face fewer bidding wars and have more negotiating power. Homes are staying on the market longer—62 days on average, a 41% increase—giving purchasers time to evaluate options and negotiate on condition or price.

Pricing appears to be normalizing. The median sales price slipped just 2.3% and the price per square foot ticked down 0.6%, keeping values near the \$800k level. Inventory remains lean (503 homes for sale, down 5.5%), which helps limit downside pressure. The number of homes going into contract (-17.5%) and closing (-10.8%) declined. Sellers still received 97.7% of their list price on average, so well-priced homes continue to attract buyers.

Altogether, the data suggest a more balanced, buyer-friendly market: fewer bidding wars, more days on market and near-flat pricing.



SINGLE FAMILY HOMES

JANUARY 2026

Median Sales Price	\$800,000 ↓
Days on market	62 ↑
\$ / SQ. FT.	\$504 ↓
# For Sale On Last Day Of Month	503 ↓
Went Into Contract	179 ↓
Properties Sold	166 ↓

SINGLE FAMILY RESIDENCES

MONTH-OVER-MONTH COMPARISON



CHANGE IN PAST MONTH:

SALES PRICE: -4.8%

DAYS ON MARKET: +1 day

YEAR-OVER-YEAR COMPARISON

“Altogether, the data suggest a more balanced, buyer-friendly market: fewer bidding wars, more days on market and near-flat pricing.”

	MEDIAN		
	JAN-2026	JAN-2025	%Δ
Sales Price	\$800,000	\$818,500	-2.3%
Days On Market	62	44	+40.9%
\$/SQ. FT.	\$504	\$507	-0.6%

	TOTAL		
	JAN-2026	JAN-2025	%Δ
Went Into Contract	179	217	-17.5%
Properties Sold	166	186	-10.8%
# For Sale Last Day of Month	503	532	-5.5%
% Of Properties Sold Over List	18.7%	33.3%	-43.8%
% Of List Price Received <i>(Average)</i>	97.7%	99.3%	-1.6%

SONOMA COUNTY MARKET UPDATE

FEBRUARY 2026

YEAR-OVER-YEAR REGION COMPARISON

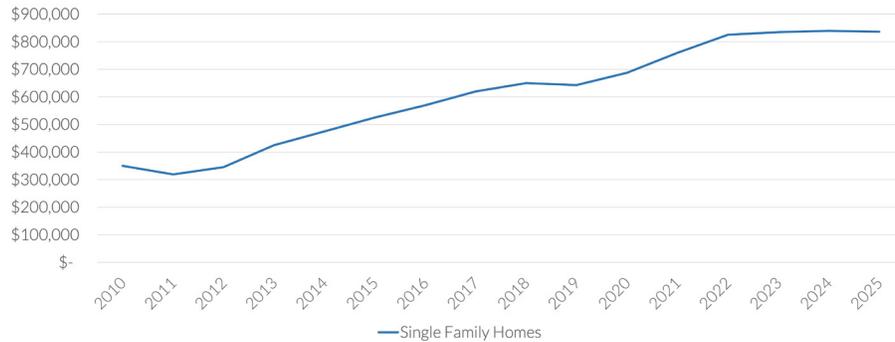
REGION	HOMES SOLD (TOTAL)			DAYS ON MARKET (MEDIAN)			SALE PRICE (MEDIAN)		
	2025	2024	%Δ	2025	2024	%Δ	2025	2024	%Δ
Bodega Bay	43*	43*	0%	34	45	▼ 24%	\$1,405,000	\$1,350,000	▲ 4%
Cazadero	28*	20*	▲ 40%	43	36	▲ 19%	\$560,815	\$622,000	▼ 10%
Cloverdale	90	96	▼ 6%	52	43	▲ 21%	\$632,500	\$649,500	▼ 3%
Cotati	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%
SONOMA COUNTY	3,743	3,585	▲ 4%	39	32	▲ 22%	\$836,000	\$839,464	▼ 0%

SONOMA COUNTY MARKET UPDATE

FEBRUARY 2026

YEAR-OVER-YEAR COMPARISONS

MEDIAN SALE PRICE



Single Family Residences

\$836,000

-0.4% change year-over-year

MEDIAN MARKET TIME

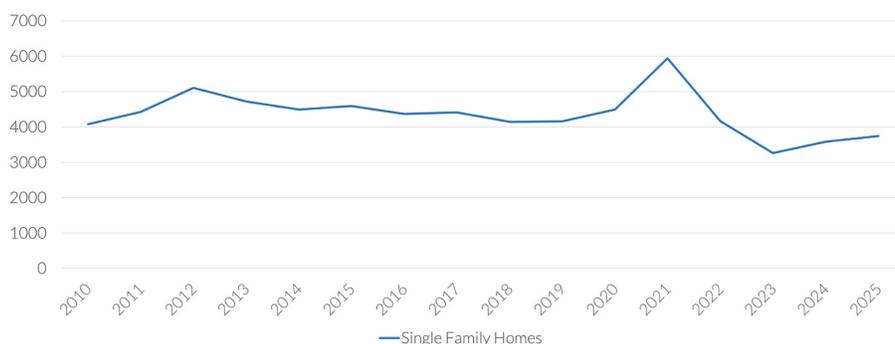


Single Family Residences

39 days

+7 day change year-over-year

NUMBER OF SALES



Single Family Residences

3,743

+4.4% change year-over-year