

A wide-angle photograph of a vineyard in Sonoma County. The foreground is filled with rows of grapevines trained in a fan-like pattern, with a dense carpet of yellow wildflowers in the immediate foreground. The middle ground shows rolling hills covered in vineyards, with the sunlight catching the ridges. In the background, a range of mountains is visible under a sky filled with wispy, light-colored clouds.

Sonoma County

MARKET REPORT

DECEMBER 2025

corcoran

ICON PROPERTIES

Sonoma County Market Talk

As 2026 gets underway, the market feels calmer and more deliberate. Buyers are stepping back in with clearer expectations, and sellers are approaching the year with a better sense of what it takes to get a deal done. The rush of late fall is behind us, but that's not a bad thing. What's replaced it is more thoughtful decision-making, more realistic pricing, and more productive conversations on both sides. This early part of the year is less about speed and more about positioning, which makes it a smart time to look at where the market is heading.

In Sonoma County, the number of home sales decreased 4.9% to 269 from the prior month, while the number of available listings decreased 35.3% to 516. Days on market increased 12.5% to 81 days. Median sales price increased 5.1% from the prior month and decreased 1.2% from the prior year to \$840,000. For condos, the number of sales increased 4.5% to 23 from the prior month, while the number of available listings decreased 28.2% to 61. Days on market increased 38.2% to 94 days. Median sales price increased 3.0% from the prior month and increased 5.9% from the prior year to \$411,000.

Considering a move this year? Having the right strategy early can simplify the process and put you in a strong position. Let's connect and talk through your goals.

Notable Numbers

Sonoma County: **DECEMBER 2025**

9

PROPERTIES SOLD
OFF MARKET

24

SOLD WITH
ADDITIONAL
DWELLING

20%

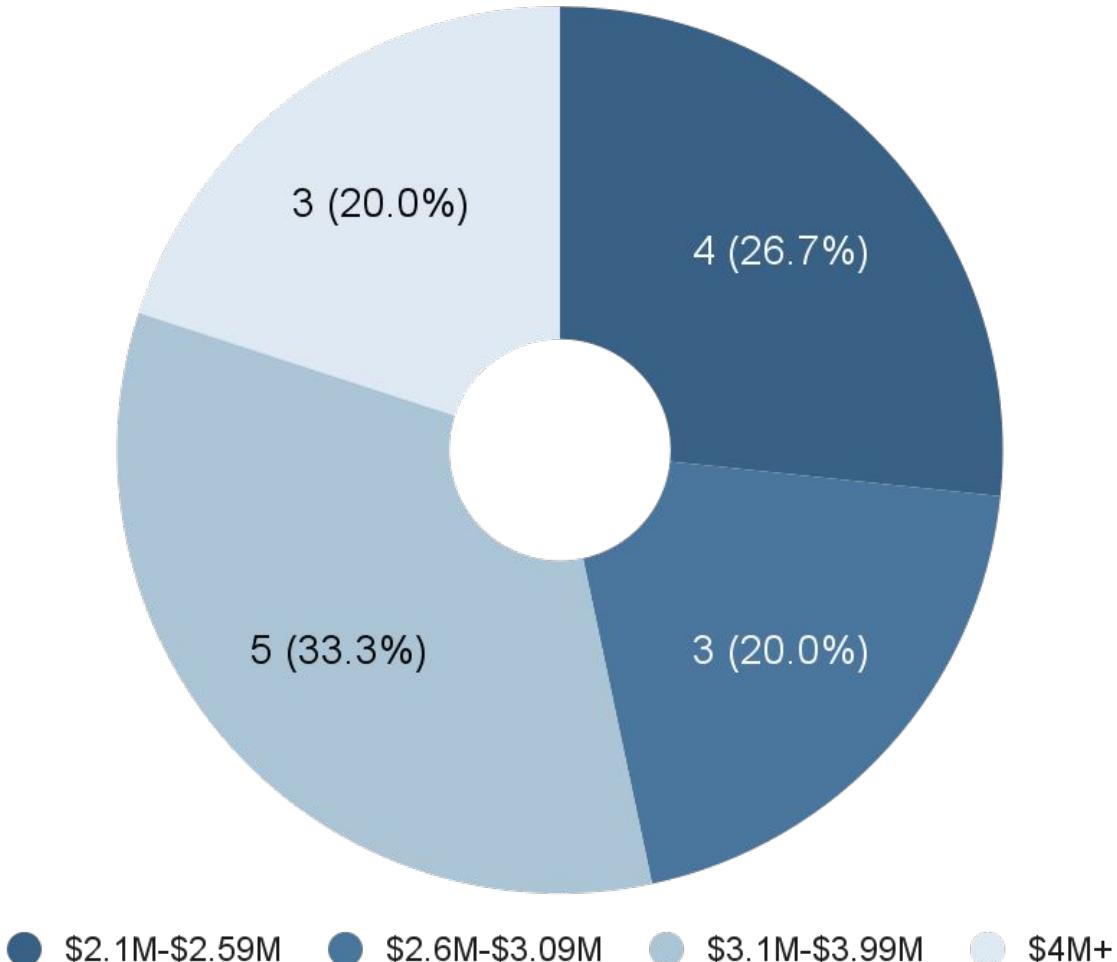
SOLD ABOVE
LIST PRICE

35%

HAD MULTIPLE
OFFERS

A Look at Luxury

Sonoma County: DECEMBER 2025



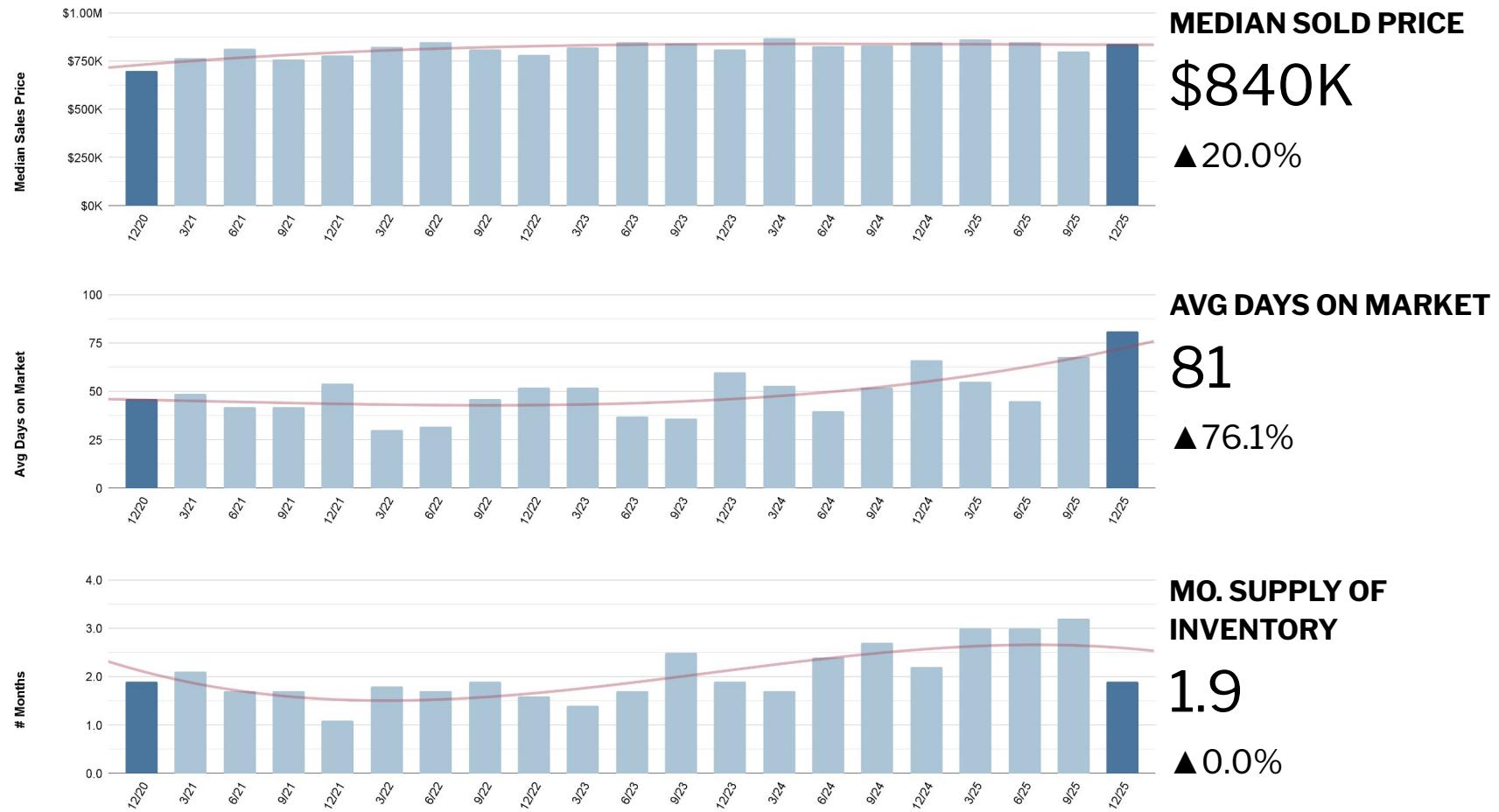


Single Family Homes

Sonoma County: **DECEMBER 2025**

5 Year Change: Q4 2020 vs. Q4 2025

Sonoma County | Single Family Homes



Market Snapshot

Sonoma County | Single Family Homes: **DECEMBER 2025**

MEDIAN SOLD PRICE

\$840K

M-o-M Change **▲5.1%**

Y-o-Y Change **▼1.2%**

PRICE PER SQ. FT.

\$526

M-o-M Change **▼5.7%**

Y-o-Y Change **▼2.4%**

DAYS ON MARKET

81

M-o-M Change **▲12.5%**

Y-o-Y Change **▲22.7%**

PROPERTIES SOLD

269

M-o-M Change **▼4.9%**

Y-o-Y Change **▲11.6%**

MONTHS OF INVENTORY

1.9

M-o-M Change **▼32.1%**

Y-o-Y Change **▼13.6%**

% SOLD TO ORIG PRICE

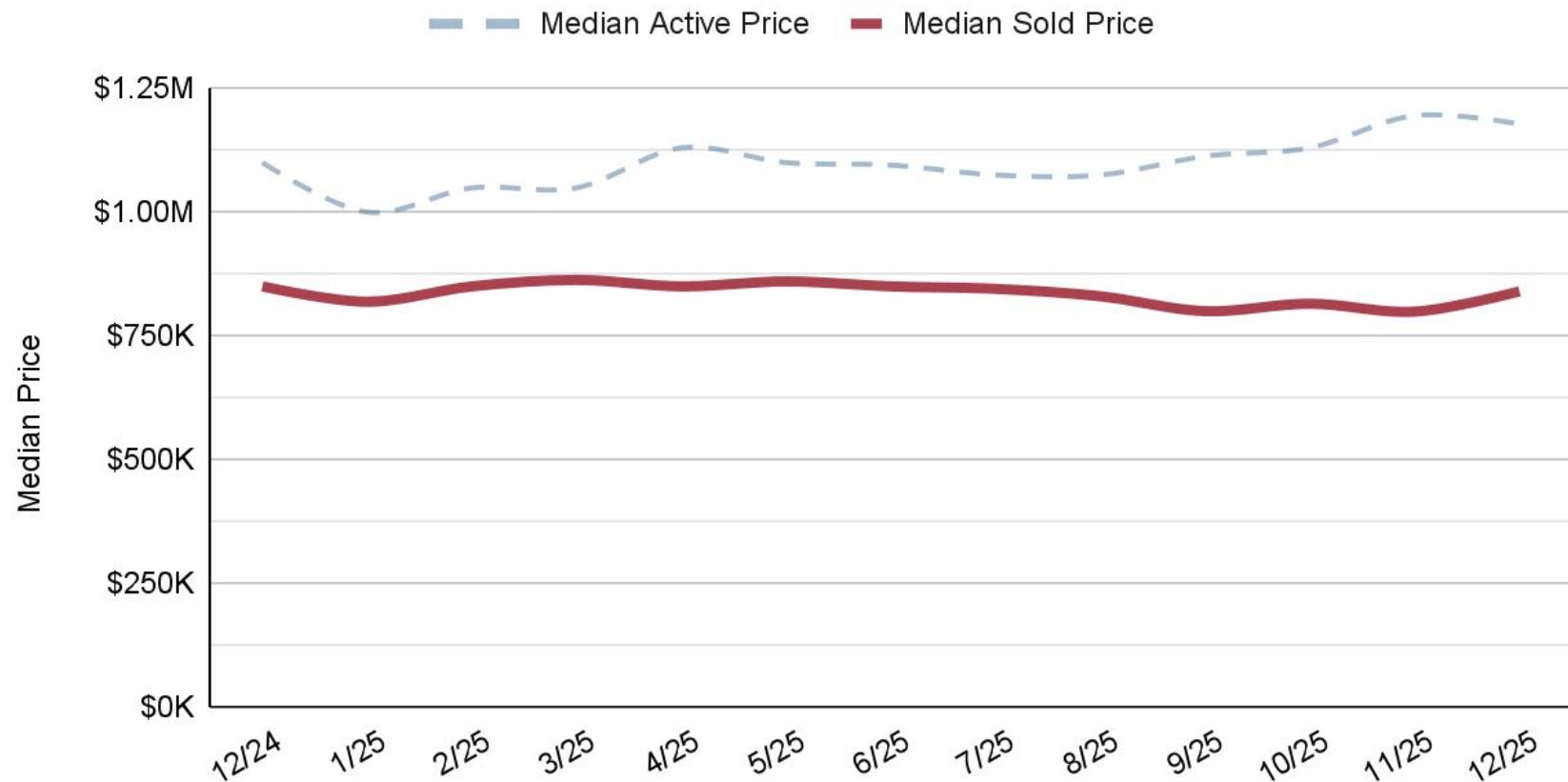
91%

M-o-M Change **▼2.2%**

Y-o-Y Change **▲0.0%**

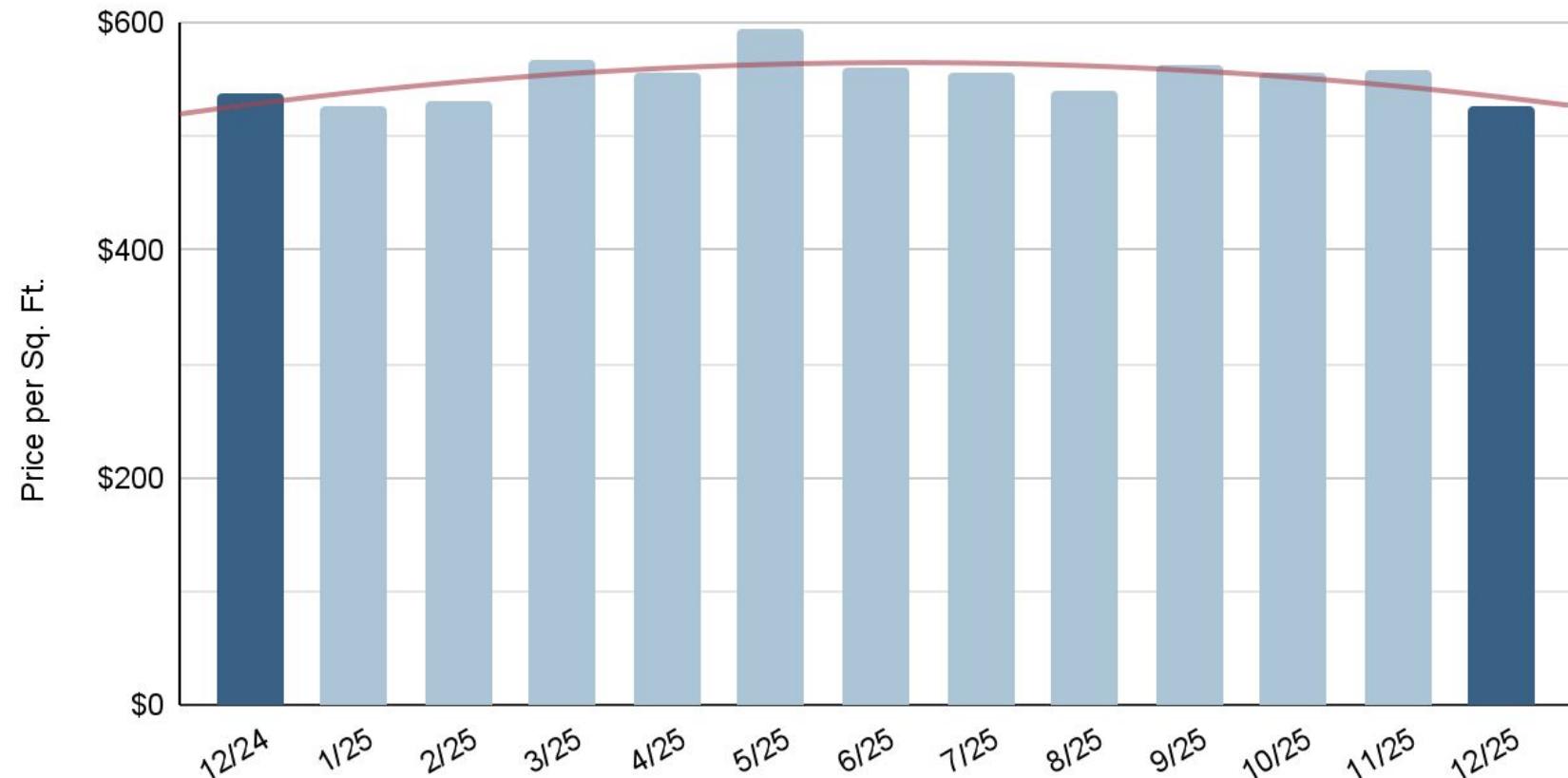
Median Active vs. Sold Price

Sonoma County | Single Family Homes: **DECEMBER 2025**



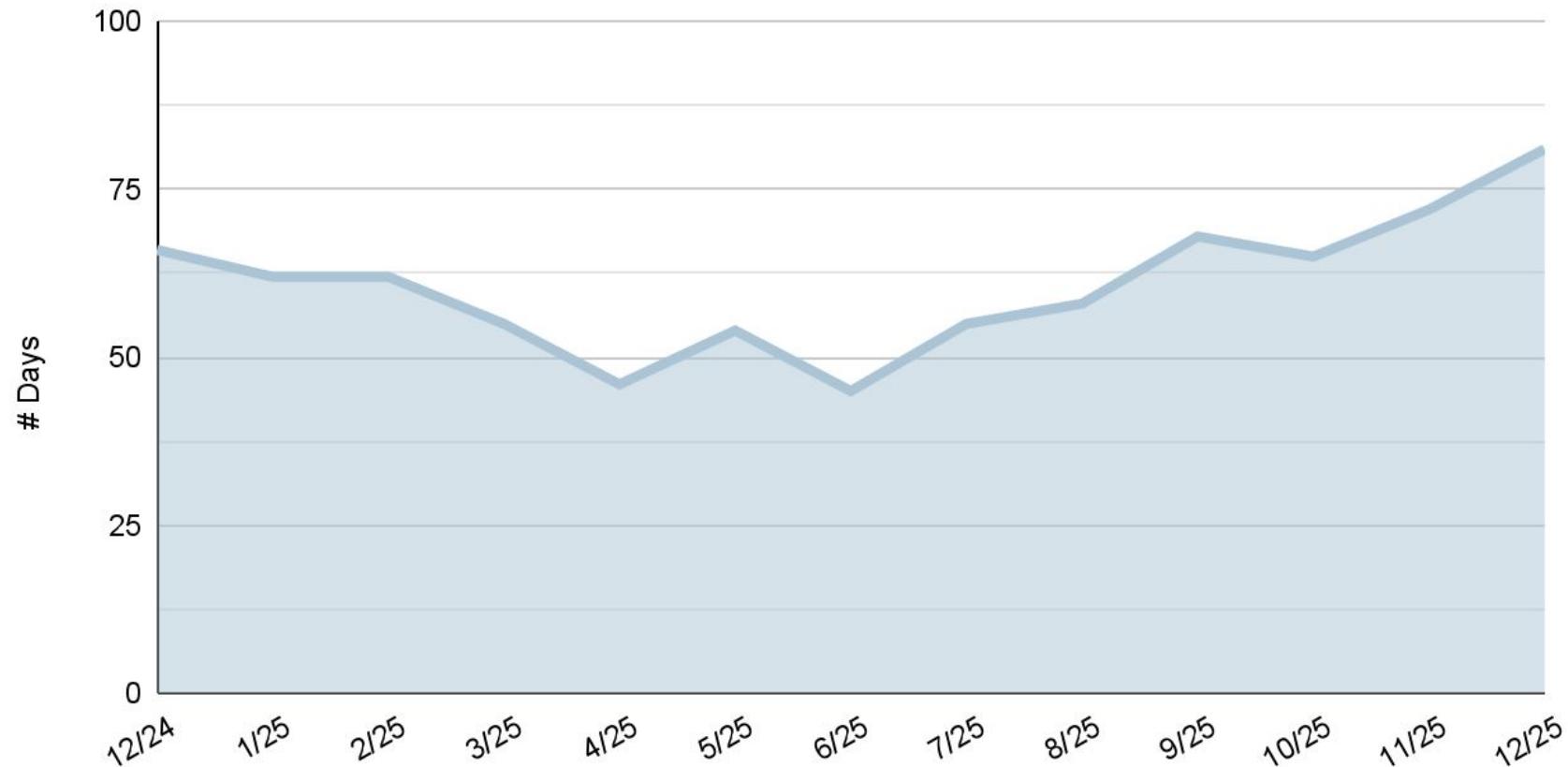
Average Price per Square Foot

Sonoma County | Single Family Homes: **DECEMBER 2025**



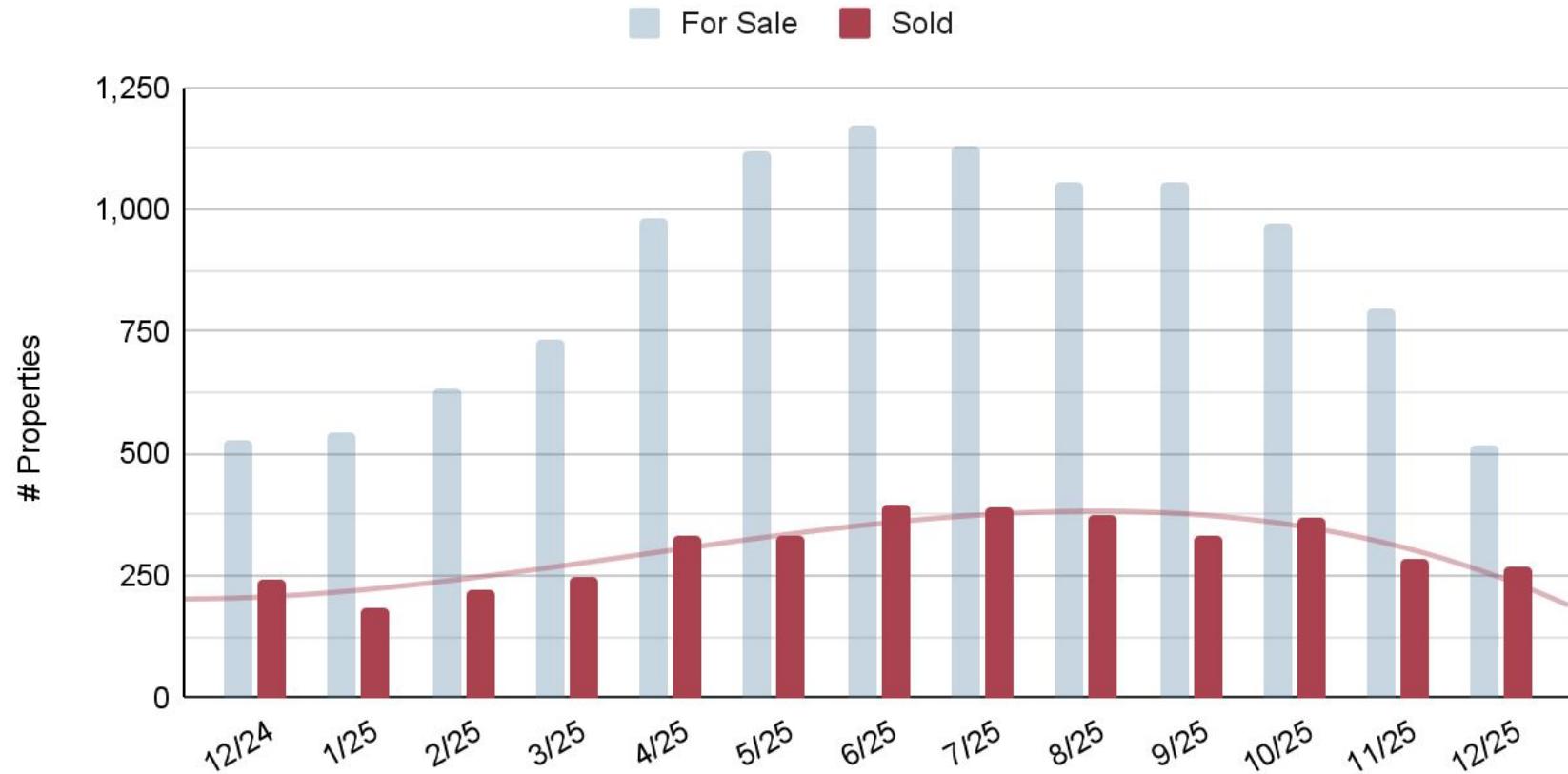
Average Days on Market

Sonoma County | Single Family Homes: **DECEMBER 2025**



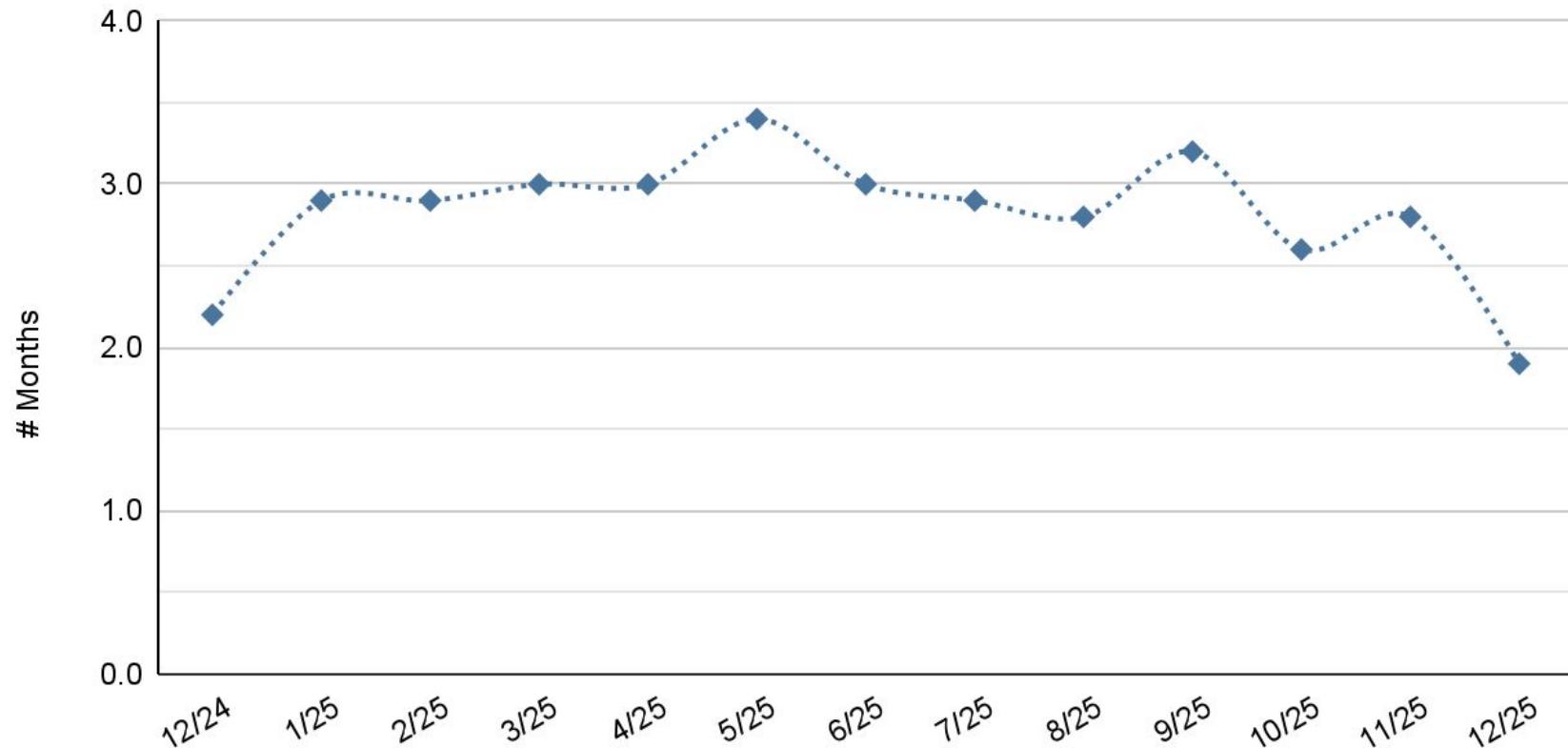
Properties For Sale vs. Sold

Sonoma County | Single Family Homes: **DECEMBER 2025**



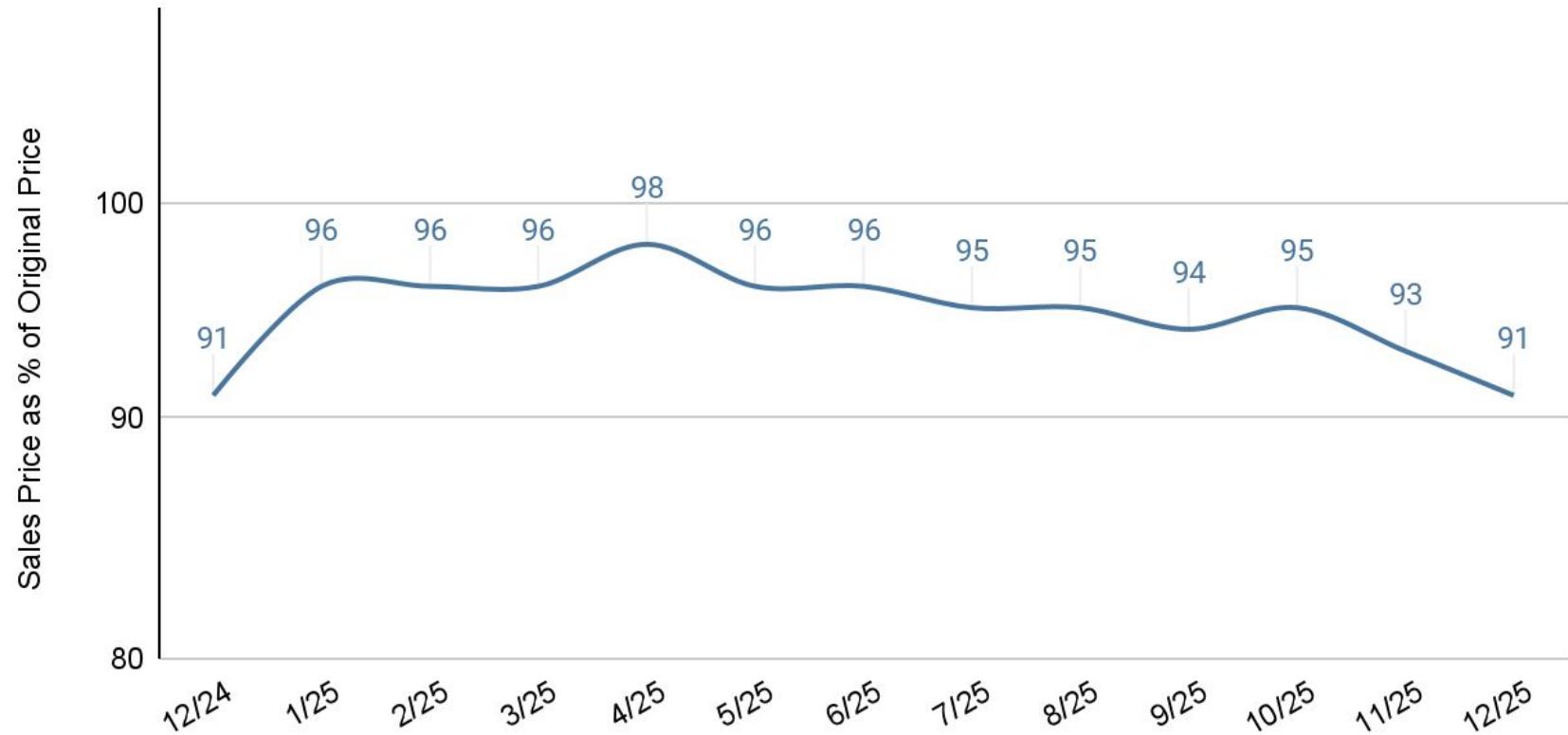
Months Supply of Inventory

Sonoma County | Single Family Homes: **DECEMBER 2025**



% Sold Price to Original Price

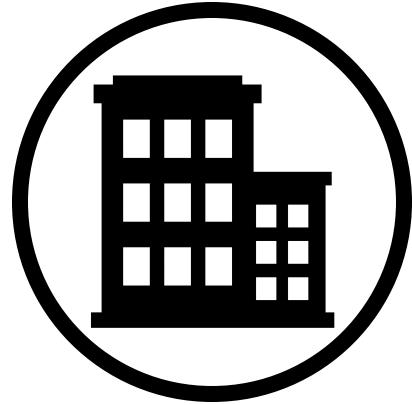
Sonoma County | Single Family Homes: **DECEMBER 2025**



Cities by the Numbers

Sonoma County | Single Family Homes: DECEMBER 2025

DECEMBER 2025							YEAR-OVER-YEAR % CHANGE					
Single Family Homes	Med. Sold \$	\$ per Sq Ft	Days on Market	# Active Props	# Sold Props	Mo. of Inventory	Med. Sold \$	\$ per Sq Ft	Days on Market	# Active Props	# Sold Props	Mo. of Inventory
Cotati	\$955K	\$550	29	6	4	1.5	--	--	--	▲100%	--	▼50%
Healdsburg	\$1.30M	\$662	100	46	7	6.6	▲40%	▼27%	▼7%	▼22%	▼46%	▲47%
Petaluma	\$903K	\$533	63	40	36	1.1	▼10%	▼2%	▼7%	▲0%	▲3%	▲0%
Rohnert Park	\$800K	\$400	90	25	22	1.1	▲0%	▲6%	▲73%	▼40%	▼19%	▼31%
Russian River	\$508K	\$424	113	31	12	2.6	▼9%	▲5%	▲6%	▼14%	▲9%	▼21%
Santa Rosa	\$766K	\$459	68	168	103	1.6	▼1%	▼4%	▲15%	▼3%	▲18%	▼20%
Sebastopol	\$1.20M	\$693	64	20	13	1.5	▲17%	▲24%	▲60%	▲100%	▼35%	▲200%
Sonoma	\$940K	\$615	105	55	32	1.7	▼10%	▼14%	▲42%	▲31%	▲52%	▼15%
Sonoma Coast	\$1.00M	\$801	116	28	4	7.0	▼27%	▼7%	▲190%	▲40%	▲100%	▼30%
Windsor	\$796K	\$437	87	14	10	1.4	▲1%	▼6%	▼6%	▼36%	▼9%	▼30%

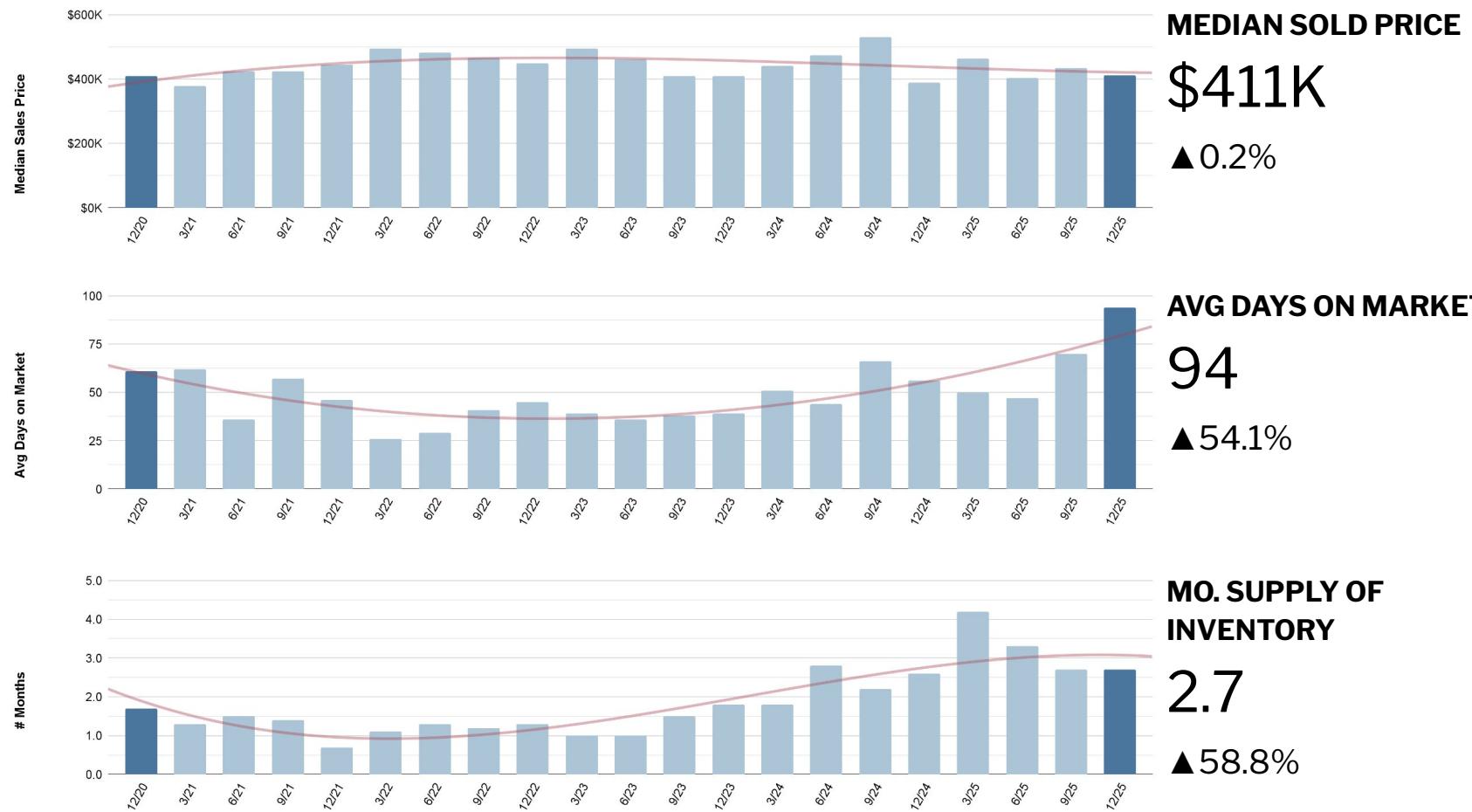


Condominiums

Sonoma County: **DECEMBER 2025**

5 Year Change: Q4 2020 vs. Q4 2025

Sonoma County | Condominiums



Market Snapshot

Sonoma County | Condominiums: **DECEMBER 2025**

MEDIAN SOLD PRICE

\$411K

M-o-M Change **▲3.0%**

Y-o-Y Change **▲5.9%**

PRICE PER SQ. FT.

\$404

M-o-M Change **▲3.3%**

Y-o-Y Change **▼0.5%**

DAYS ON MARKET

94

M-o-M Change **▲38.2%**

Y-o-Y Change **▲67.9%**

PROPERTIES SOLD

23

M-o-M Change **▲4.5%**

Y-o-Y Change **▲15.0%**

MONTHS OF INVENTORY

2.7

M-o-M Change **▼30.8%**

Y-o-Y Change **▲3.8%**

% SOLD TO ORIG PRICE

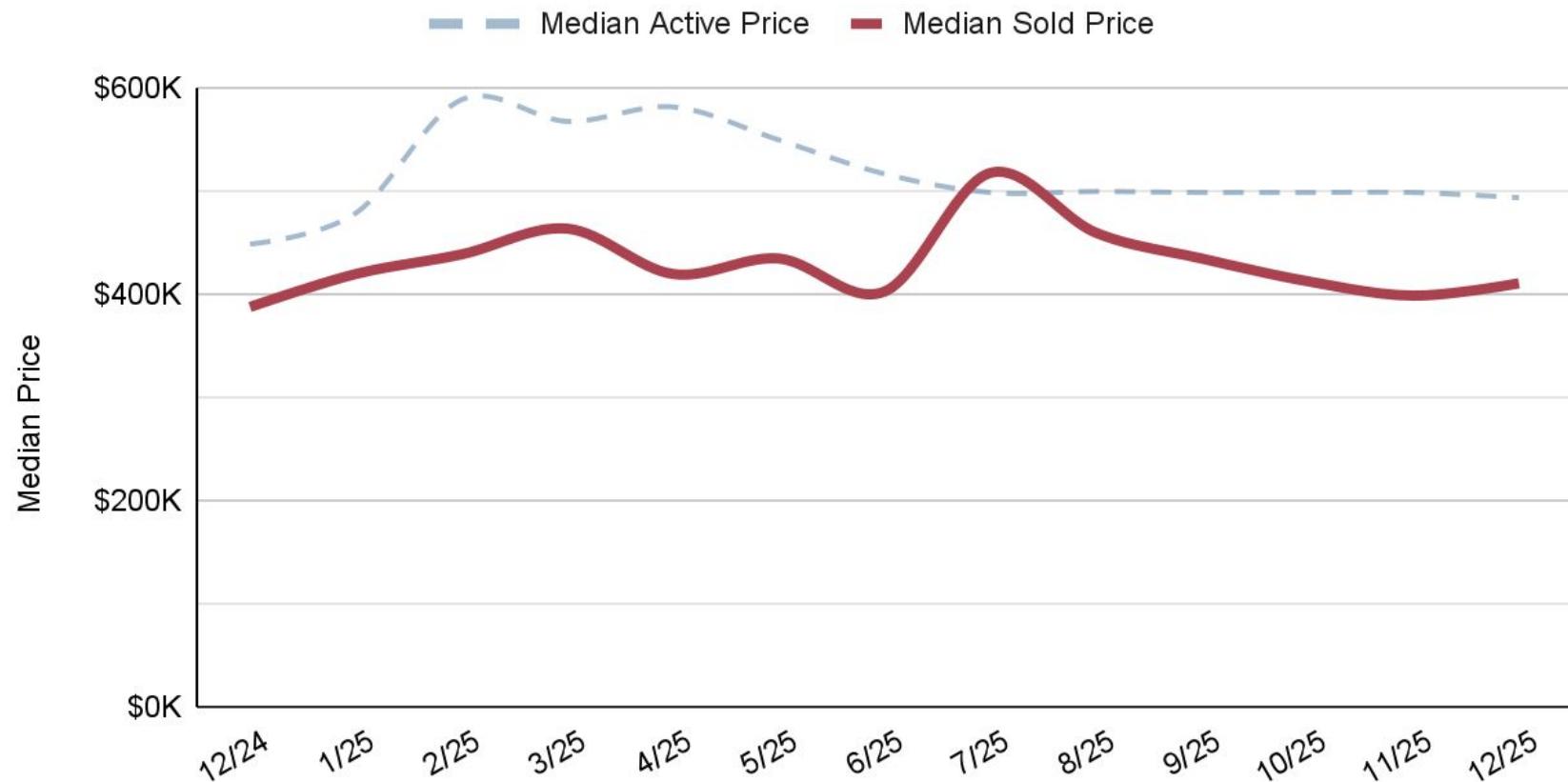
95%

M-o-M Change **▼2.1%**

Y-o-Y Change **▼4.0%**

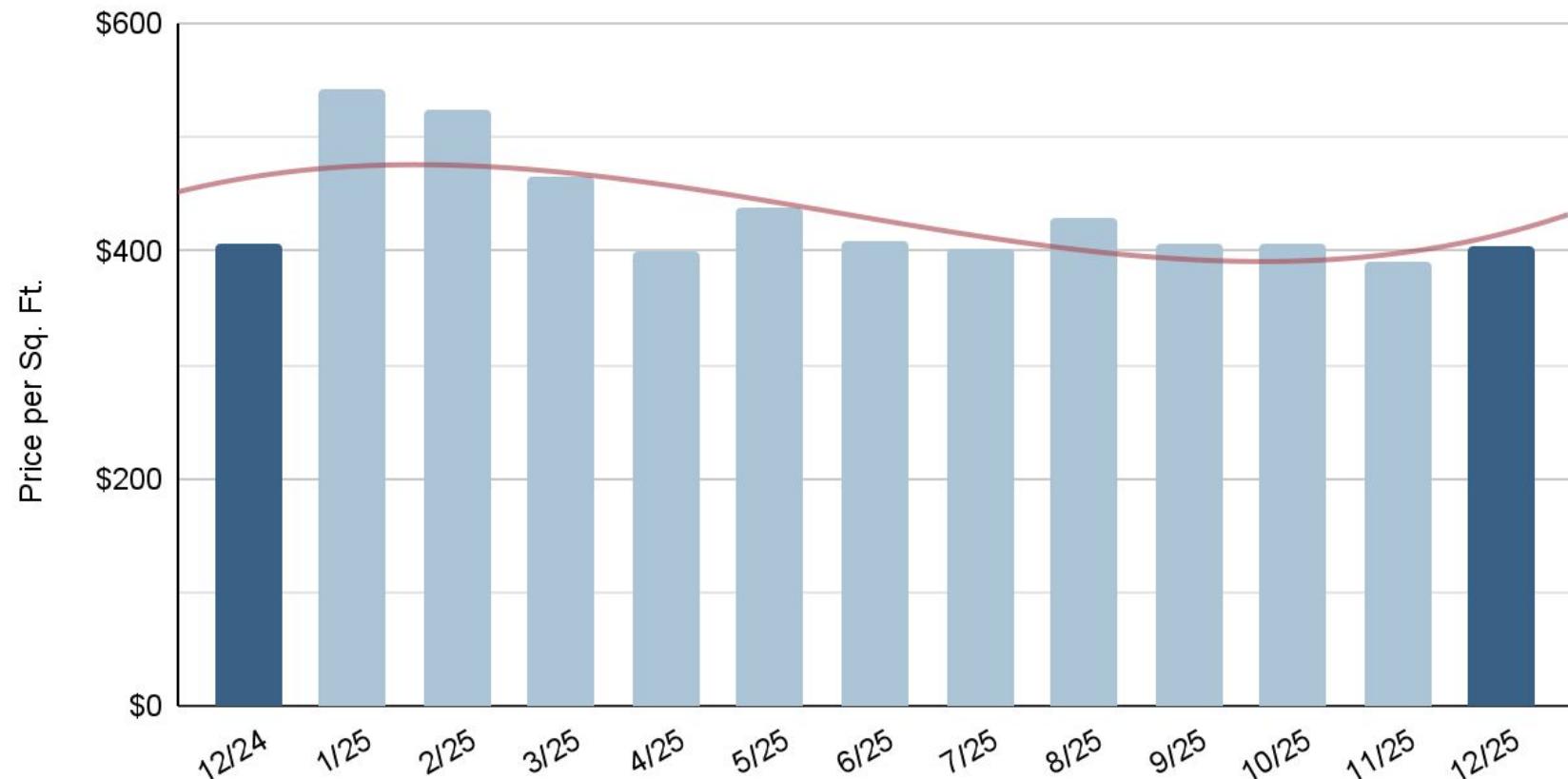
Median Active vs. Sold Price

Sonoma County | Condominiums: **DECEMBER 2025**



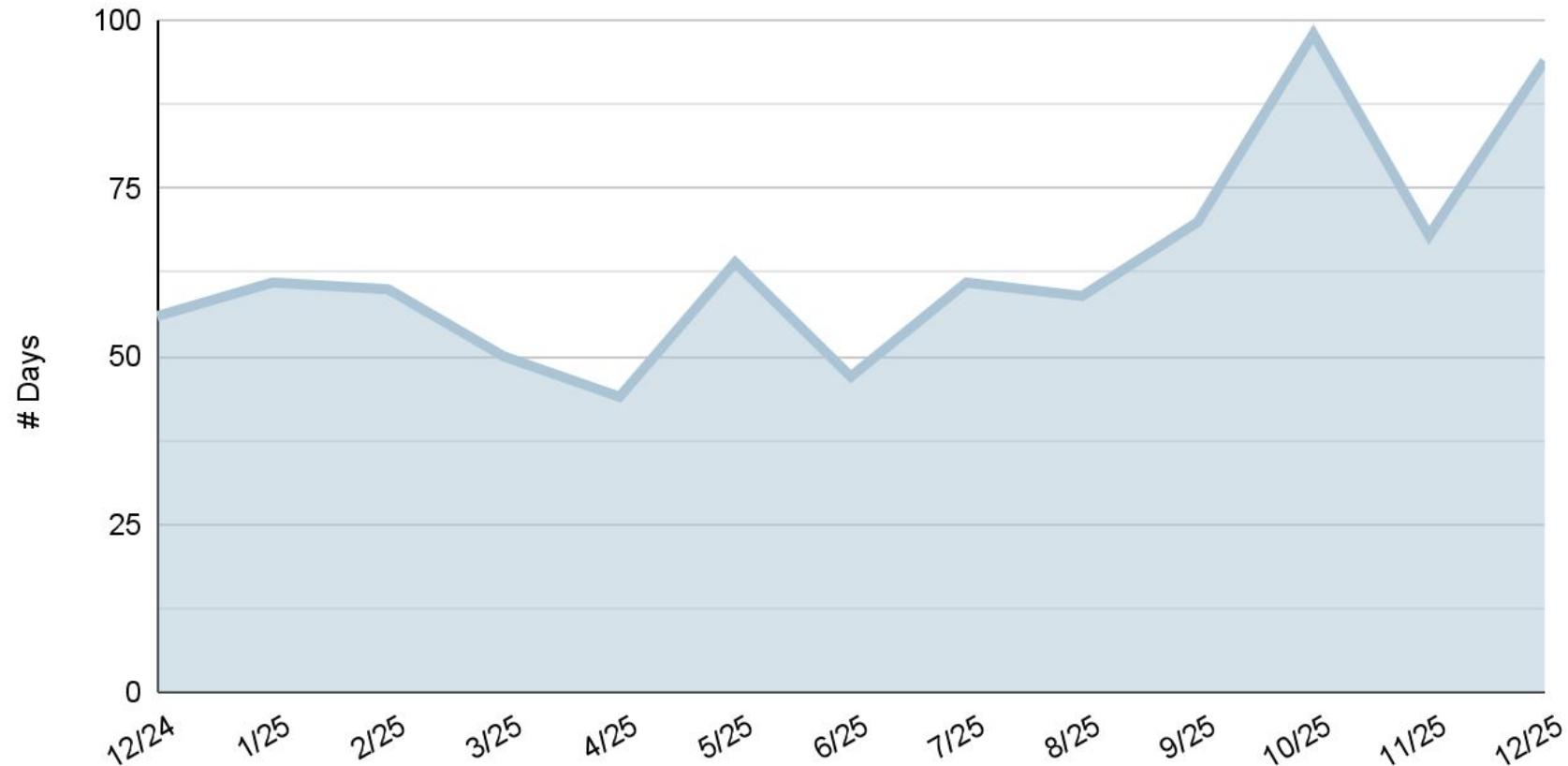
Average Price per Square Foot

Sonoma County | Condominiums: **DECEMBER 2025**



Average Days on Market

Sonoma County | Condominiums: **DECEMBER 2025**



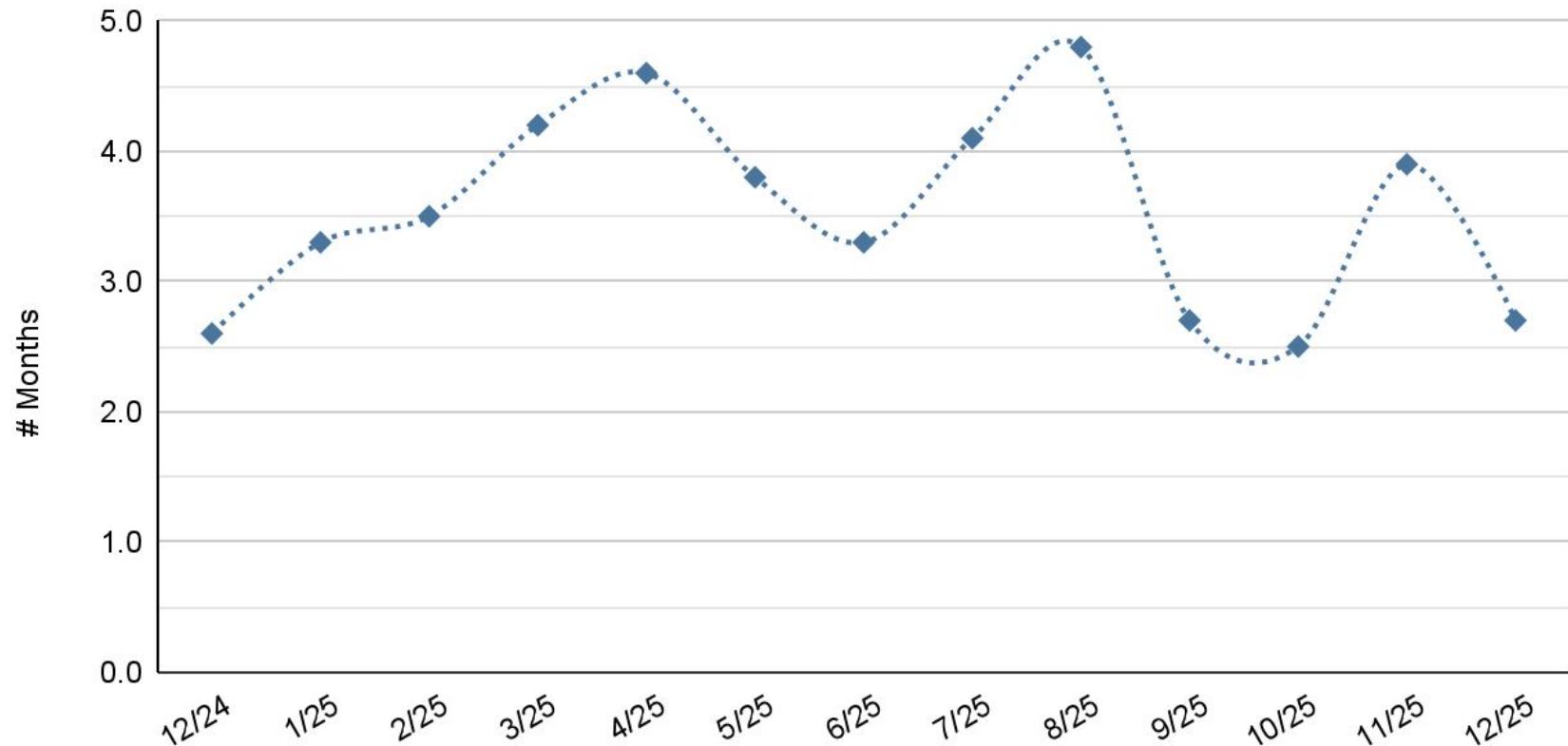
Properties For Sale vs. Sold

Sonoma County | Condominiums: **DECEMBER 2025**



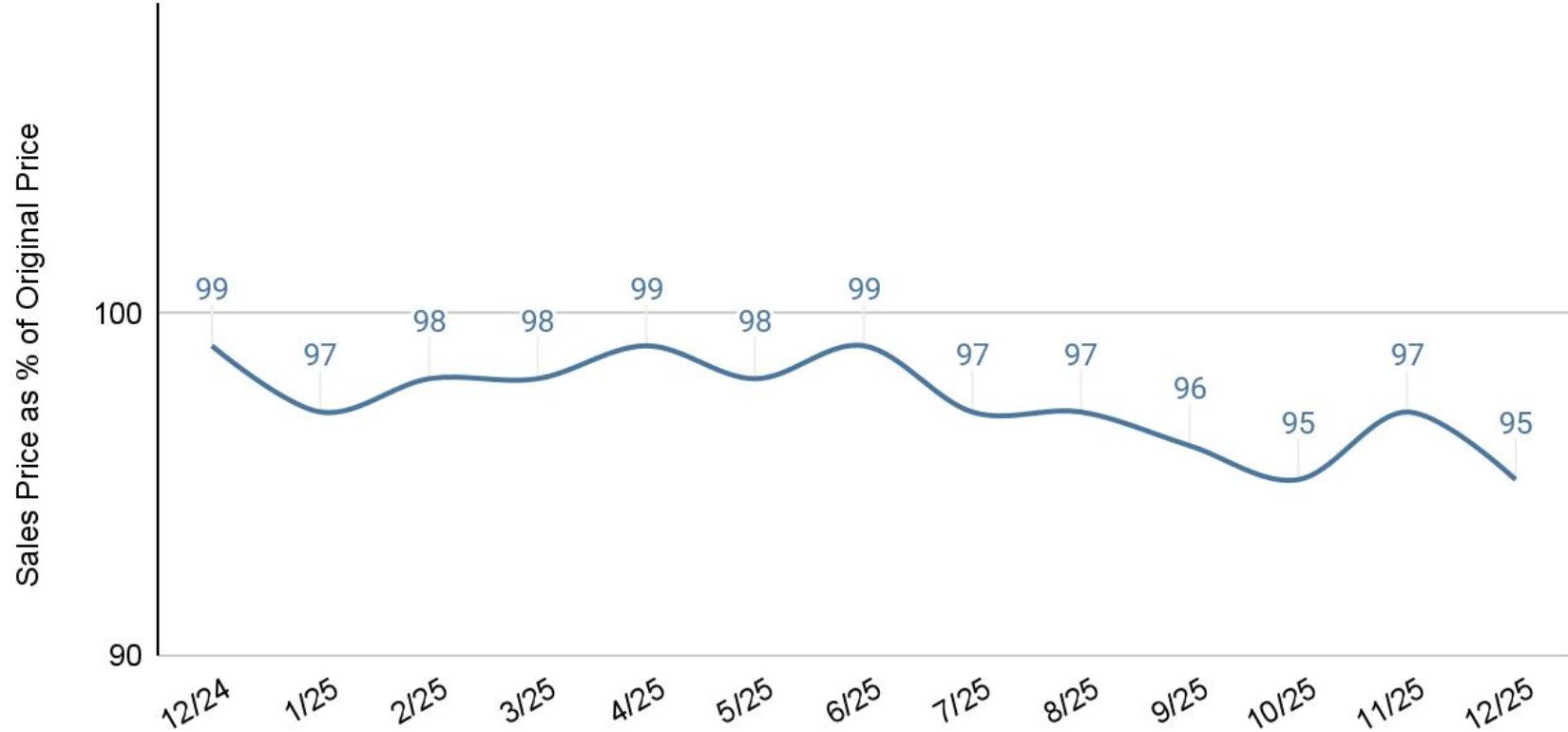
Months Supply of Inventory

Sonoma County | Condominiums: **DECEMBER 2025**



% Sold Price to Original Price

Sonoma County | Condominiums: **DECEMBER 2025**



METHODOLOGY, METRICS & SOURCE

The Corcoran Icon Properties Market Report offers current and valuable information regarding the local market. Each region reported on is broken down by city or neighborhood and contains specific details and insights related to that market.

Metrics

MEDIAN PRICE is the middle or midpoint price where half of sales fall below and half fall above this number.

AVERAGE PRICE PER SQUARE FOOT is the average sold price divided by the average square footage of sold properties.

DAYS ON MARKET averages how long a unit takes to sell and is calculated determining the number of days from when the property is first listed until the property comes off market (for example, when it becomes pending).

PROPERTIES SOLD is the total number of properties that closed during the period shown.

PROPERTIES FOR SALE is the total number of properties available for sale during the period shown.

MONTHS SUPPLY OF INVENTORY is the number of months it would take for all currently for sale properties to sell based on the current pace of sales. This is calculated by dividing the number of properties for sale by the number of properties sold during a given month.

PERCENTAGE SOLD PRICE TO ORIGINAL PRICE is the final sales price of a property compared to the original list price, expressed as a percentage. This number is above 100% when properties are selling above the original list price.

Data Source:

Figures in this report are based on publicly reported closed sales information via the Multiple Listing Service (MLS). Information is deemed reliable, but may contain errors and is subject to change. Not all sales are entered into the MLS. Information is added daily, therefore data available is constantly changing. Current monthly sold statistics may be adjusted on the next month's report; this reflects additional closed transactions that are reported late.

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