



Napa County Real Estate

April 2026 Report

with market data through March

Due to the relatively low number of sales in Napa County, anomalous fluctuations in monthly statistics are not uncommon.

COMPASS

Shrugging Off War, Buyer Demand Continues to Strengthen Moving Deeper into Spring

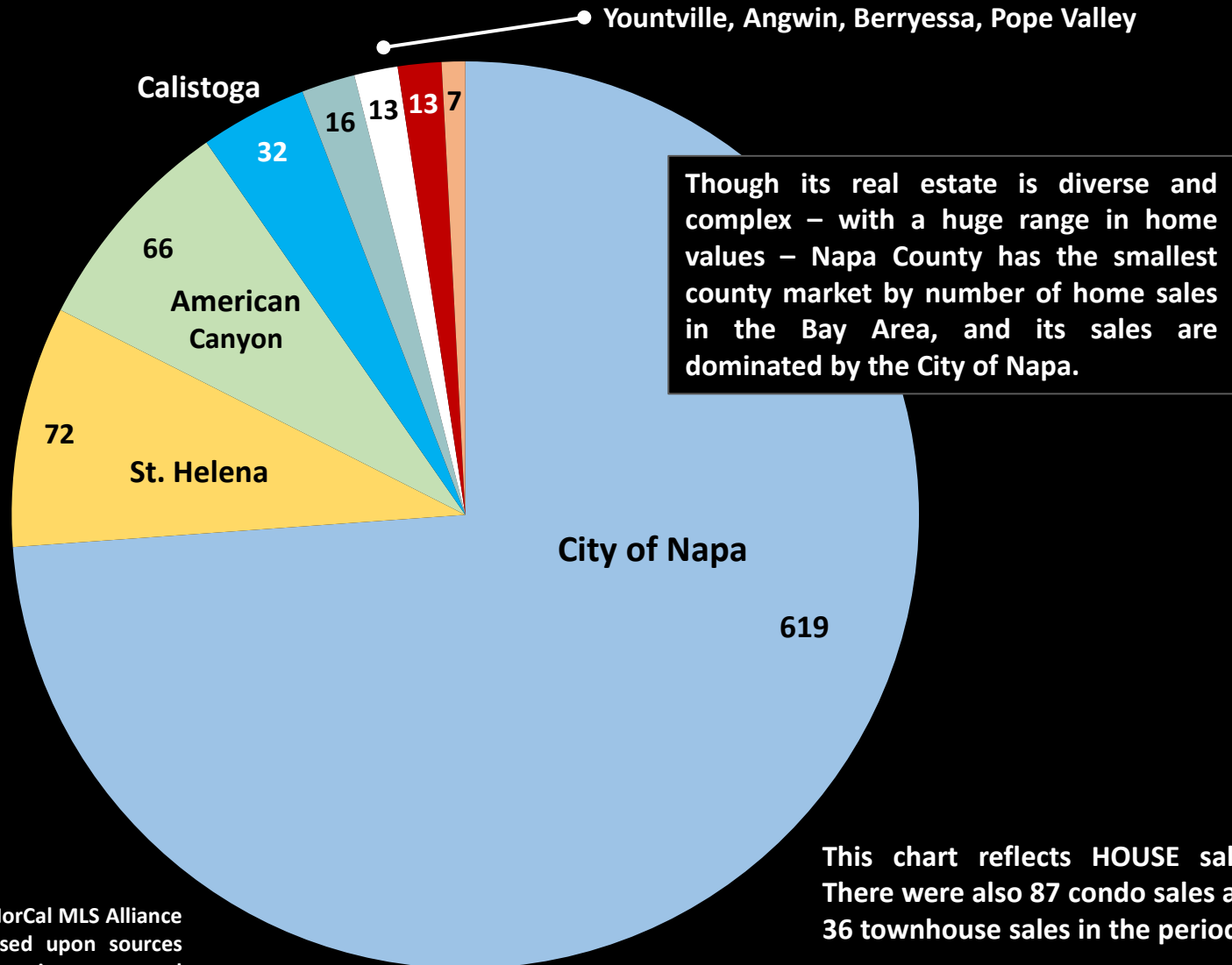
Despite significant negative economic effects from the Iran war – rising interest rates; volatile financial markets; soaring oil and gas prices; and fears of increased inflation – Bay Area real estate markets saw relatively little impact in March. So far, there has been no reaction comparable to what occurred last year with the tariff shock, and as of April 8th, virtually all economic indicators were turning in positive directions with the cease fire announcement.

Moving into spring, the numbers of new listings, of homes going into contract, and of closed sales climbed significantly month over month and year over year. The absorption rate ticked up and listings went into contract faster. This increased activity may lead to renewed price appreciation in the second quarter.

Report created in good faith using data from sources deemed reliable but may contain errors and subject to revision. Last period figures are preliminary estimates based on data available early in the following month. All numbers approximate and may change with late-reported activity.

Napa County House Sales

12 Months Sales by City & Town*

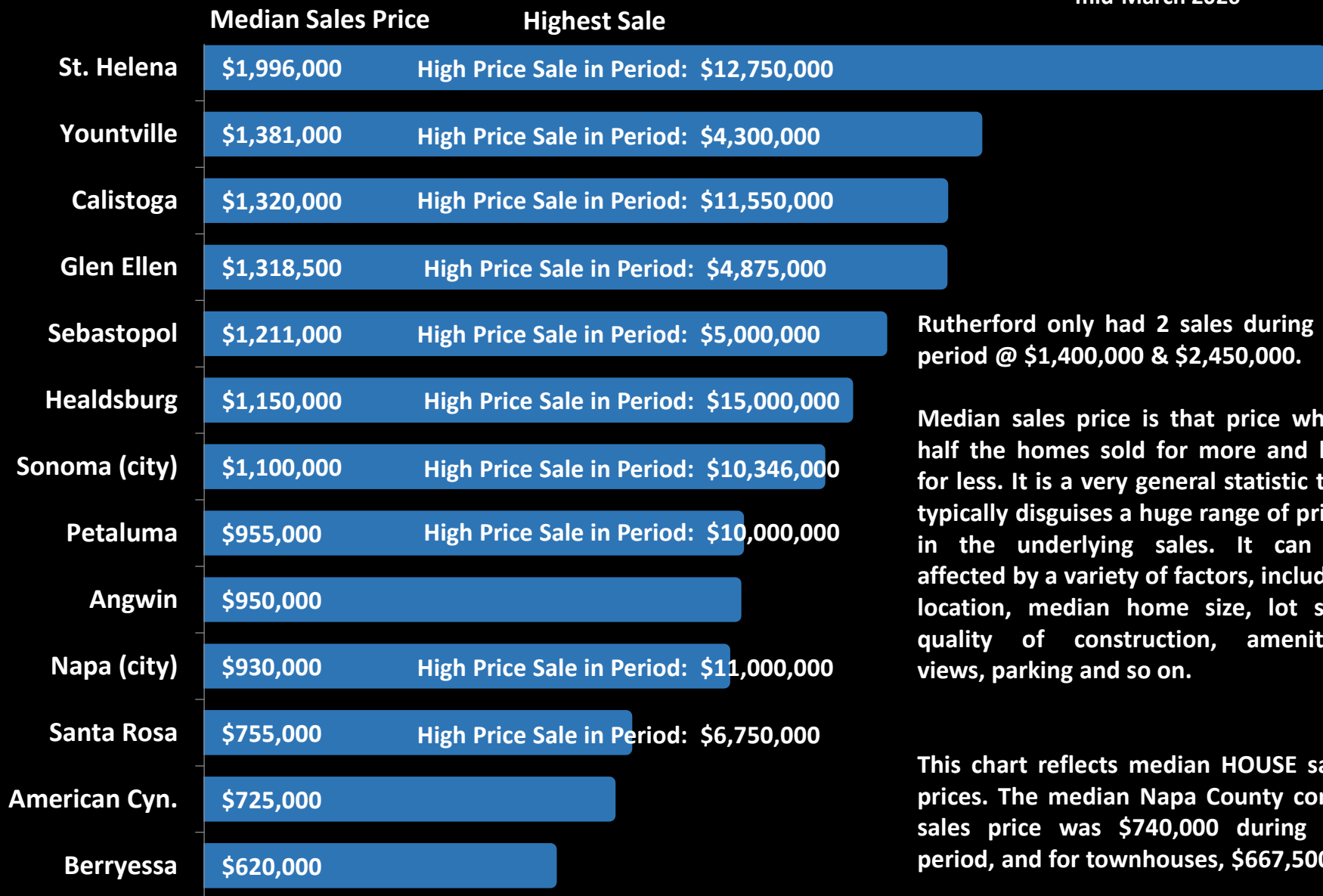


*12 months sales reported to NorCal MLS Alliance by mid-March 2026. Data based upon sources deemed reliable but may contain errors and subject to revision. All numbers approximate and may change with late-reported sales.

Napa & Sonoma Counties, Selected Markets

Median House Sales Prices, 12 Months Sales*

12 months sales through
mid-March 2026*



Rutherford only had 2 sales during the period @ \$1,400,000 & \$2,450,000.

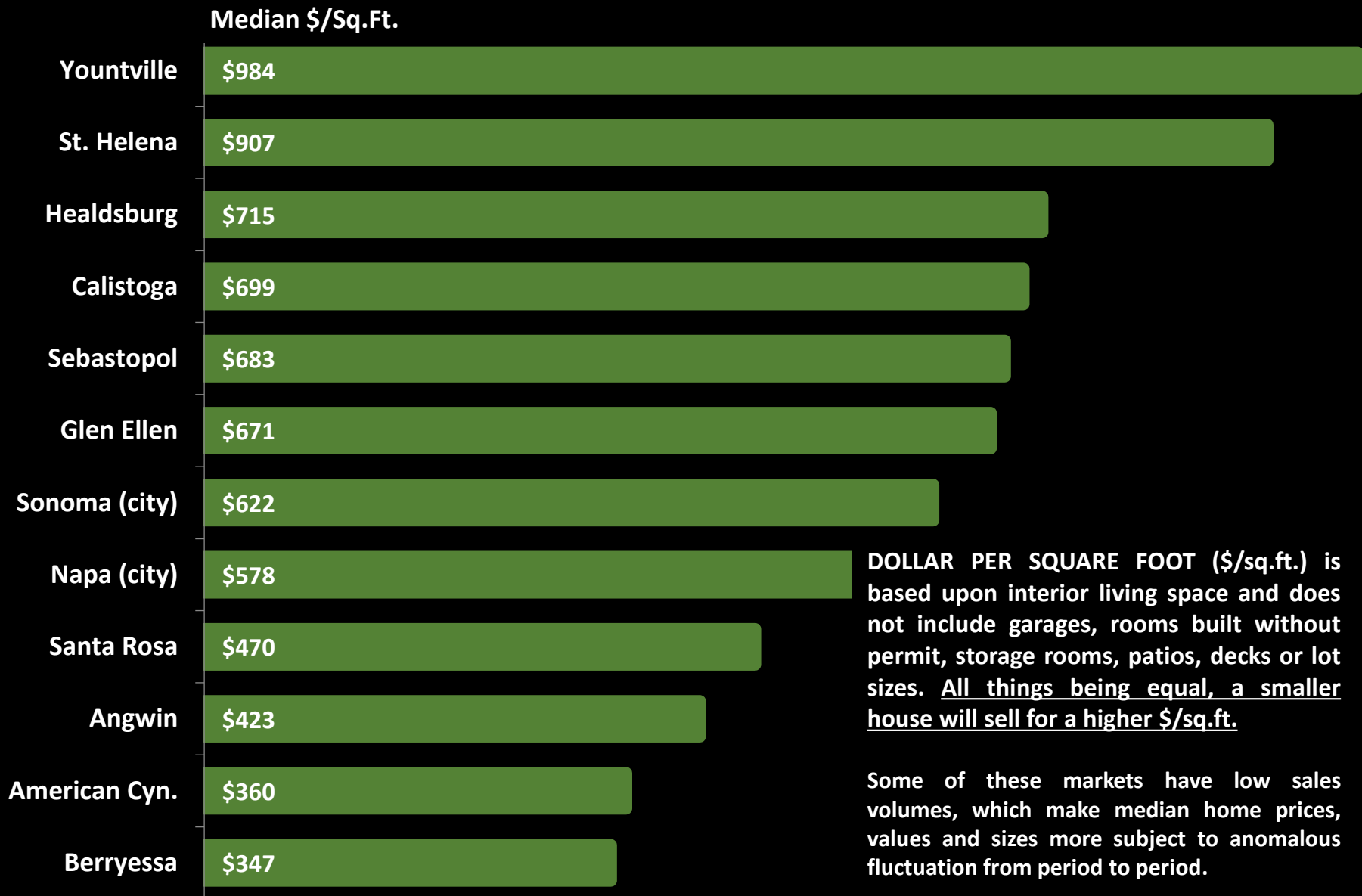
Median sales price is that price where half the homes sold for more and half for less. It is a very general statistic that typically disguises a huge range of prices in the underlying sales. It can be affected by a variety of factors, including location, median home size, lot size, quality of construction, amenities, views, parking and so on.

This chart reflects median HOUSE sales prices. The median Napa County condo sales price was \$740,000 during the period, and for townhouses, \$667,500.

*12 months sales reported to NorCal MLS Alliance by mid-March 2026. Data from sources deemed reliable but may contain errors and subject to revision. All numbers are approximate. Not all sales are reported to MLS.

Napa & Sonoma Counties, Selected Markets

Median House \$/Sq.Ft. Value, 12 Months Sales*



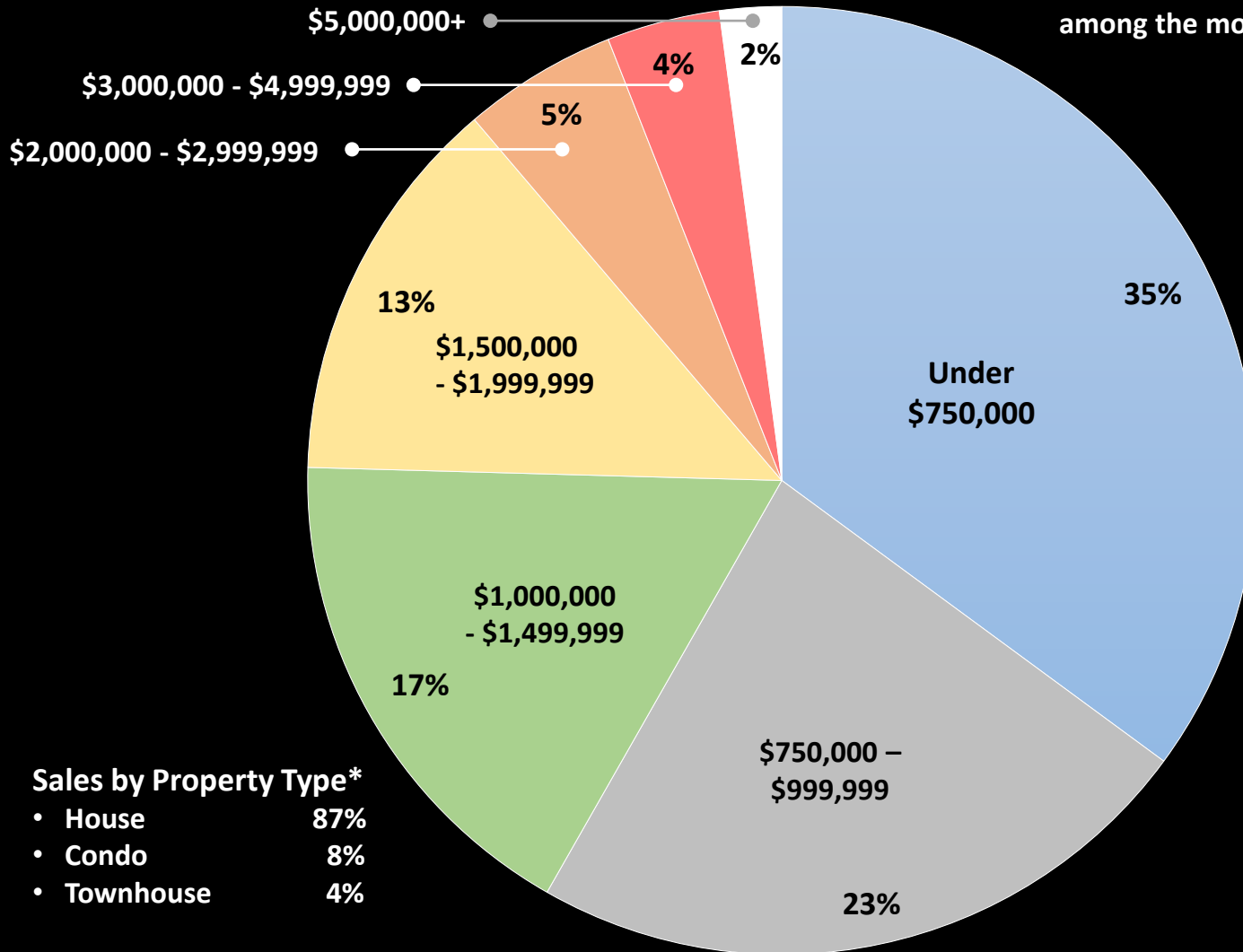
*12 months sales reported to NorCal MLS Alliance by mid-March 2026. Data from sources deemed reliable but may contain errors and subject to revision. All numbers are approximate.

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Napa County

2026 YTD Home Sales by Price Segment*

Napa County has an unusually wide range of home values, from among the more affordable in the Bay Area to among the most expensive.



Sales by Property Type*

- House 87%
- Condo 8%
- Townhouse 4%

*Sales and listings pending sale reported to NorCal MLS Alliance by 3/31/26. Not all sales are reported to MLS. Listings pending sale may not close, and pending-sale list prices may not reflect final closing prices. Data from sources deemed reliable but may contain errors and subject to revision. All numbers approximate. Percentages rounded and may not add up to 100%.

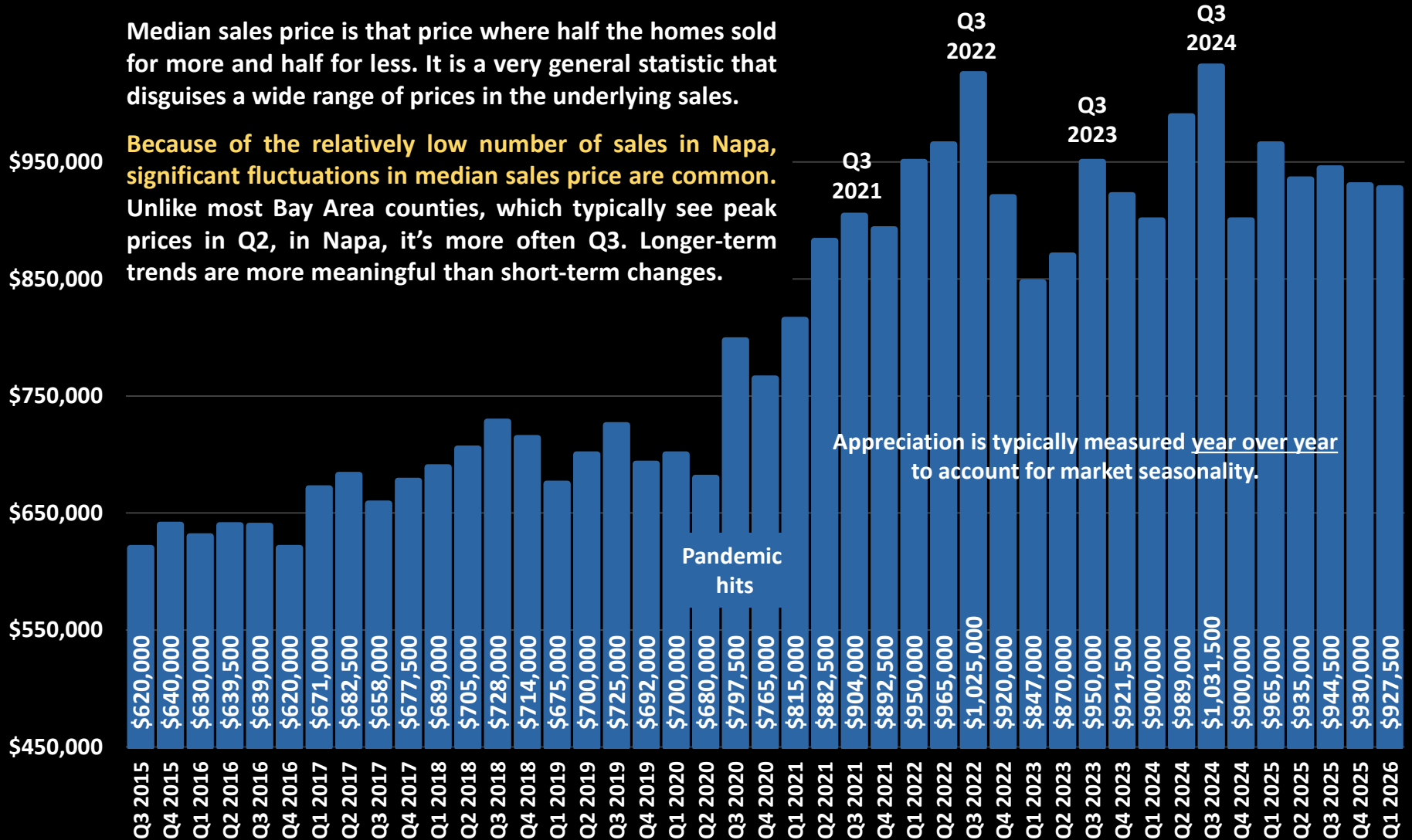
Napa County Home Price Appreciation

Median House Sales Prices by Quarter, 2015 - Present

Year over year, the Q1 2026 median house sales price fell about 4%.

Median sales price is that price where half the homes sold for more and half for less. It is a very general statistic that disguises a wide range of prices in the underlying sales.

Because of the relatively low number of sales in Napa, significant fluctuations in median sales price are common. Unlike most Bay Area counties, which typically see peak prices in Q2, in Napa, it's more often Q3. Longer-term trends are more meaningful than short-term changes.



As reported to Bareis MLS, per Broker Metrics or Infosparks. Median sales prices can be and often are affected by other factors besides changes in fair market value. Longer-term trends are more meaningful than short term fluctuations. All numbers approximate and subject to revision. Last period reading may change with late-reported sales.



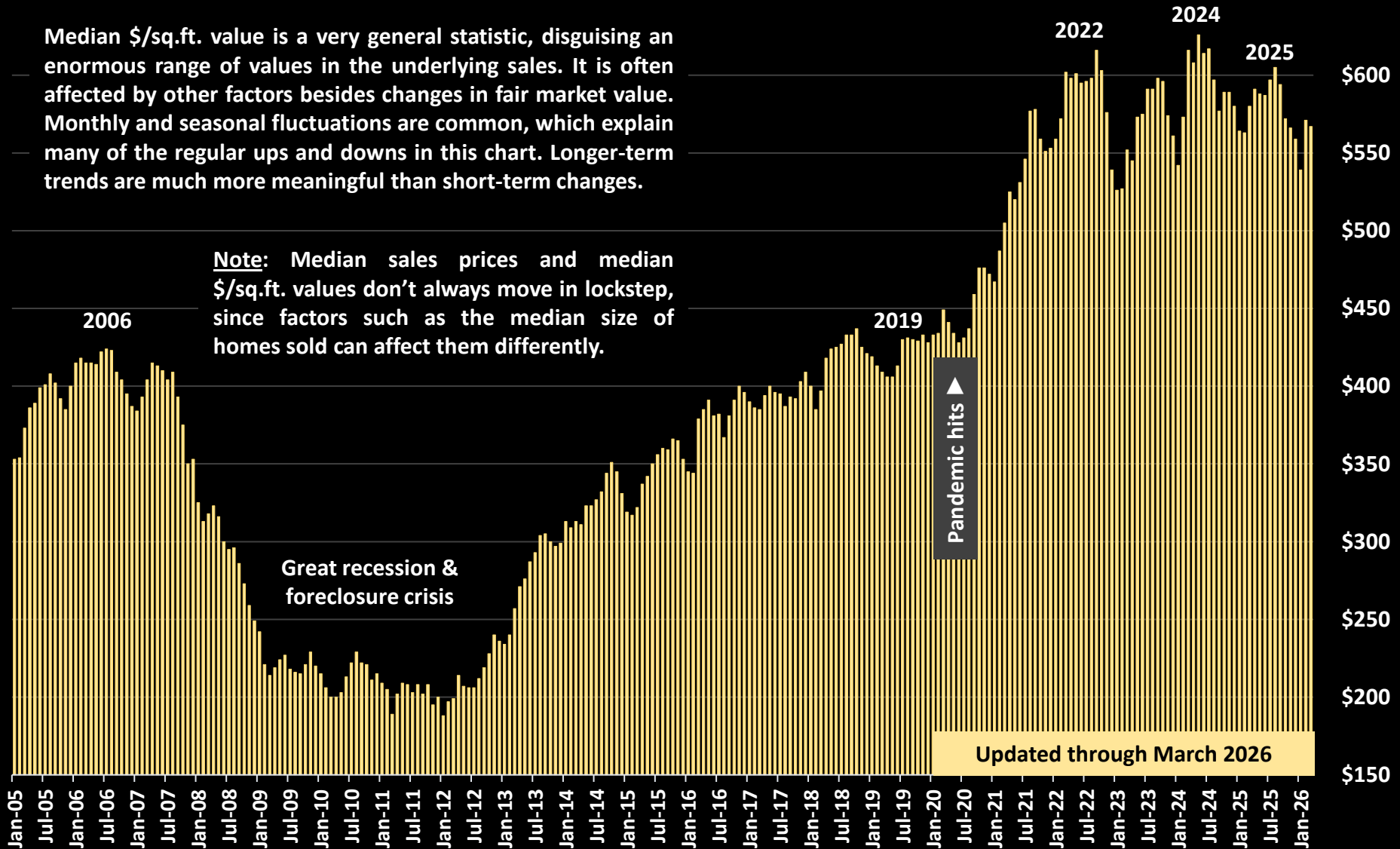
Napa County House Value Trends since 2005

3-Month Rolling Median Dollar per Square Foot Values*

The 3-month-rolling median house \$/sq.ft. value in March 2026 fell about 2% year over year.

Median \$/sq.ft. value is a very general statistic, disguising an enormous range of values in the underlying sales. It is often affected by other factors besides changes in fair market value. Monthly and seasonal fluctuations are common, which explain many of the regular ups and downs in this chart. Longer-term trends are much more meaningful than short-term changes.

Note: Median sales prices and median \$/sq.ft. values don't always move in lockstep, since factors such as the median size of homes sold can affect them differently.

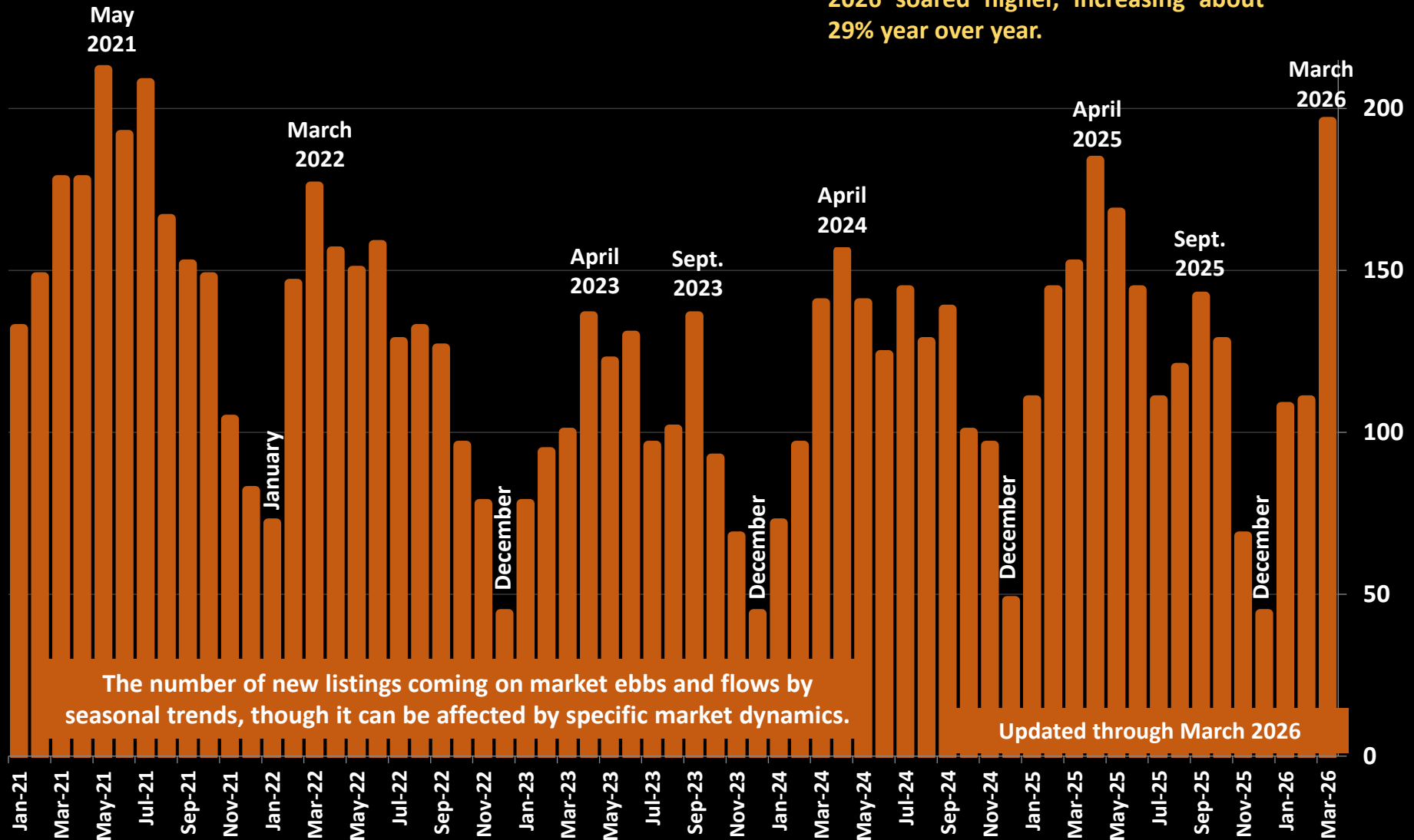


*3-month rolling median house sales values reported to NorCal MLS Alliance, per Infosparks. Analysis may contain errors and subject to revision. All numbers approximate and may change with late-reported sales.

New Listings Coming on Market

Napa County Market Dynamics & Seasonality

The number of new listings in March 2026 soared higher, increasing about 29% year over year.



The number of new listings coming on market ebbs and flows by seasonal trends, though it can be affected by specific market dynamics.

Updated through March 2026

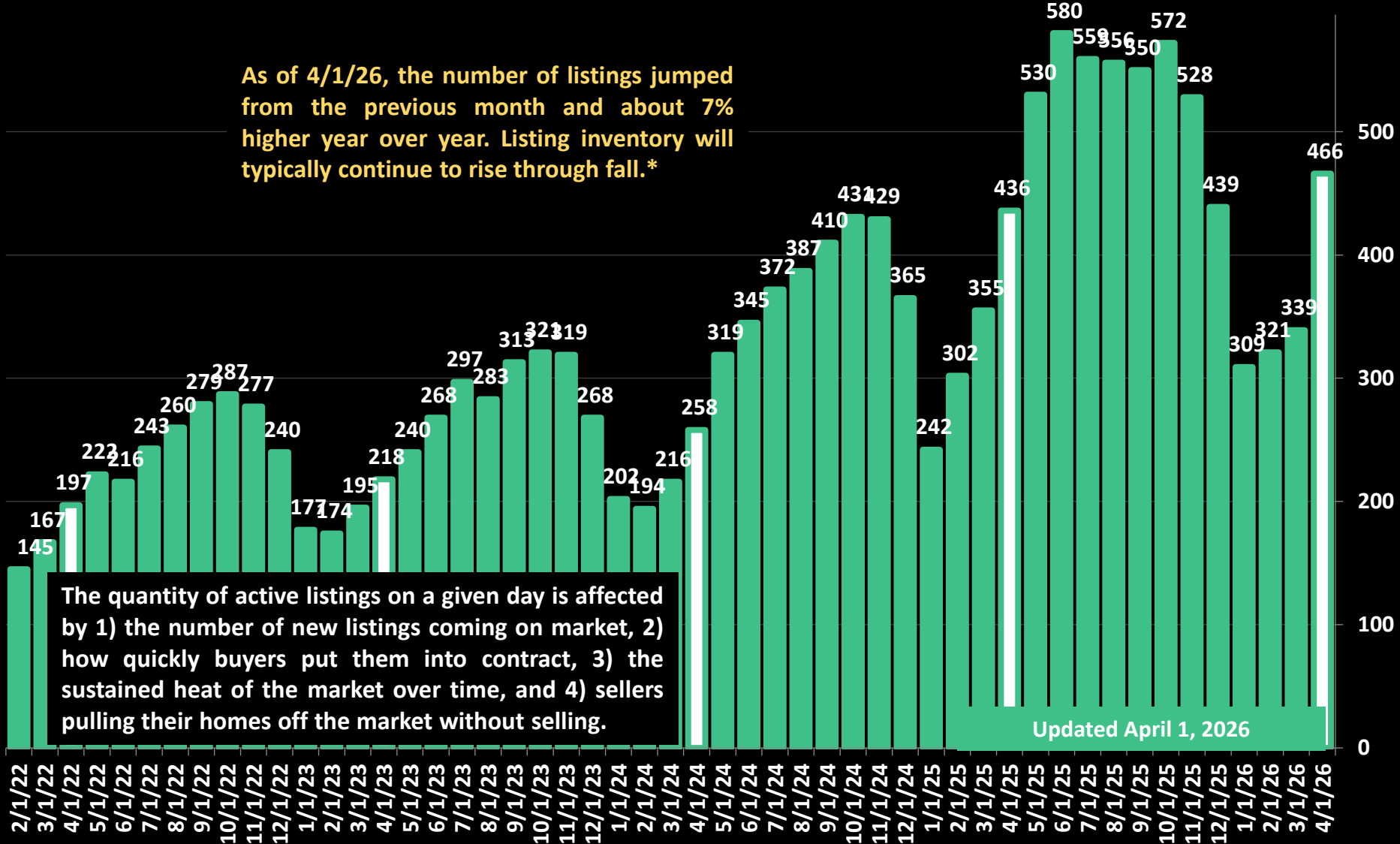
Per Realtor.com Research: <https://www.realtor.com/research/data/>, listings posted on site. Data from sources deemed reliable but may contain errors and subject to revision. May not include "coming-soon" listings. All numbers are approximate.



Napa County Homes Market

Active & Coming-Soon Listings on 1st of Month*

As of 4/1/26, the number of listings jumped from the previous month and about 7% higher year over year. Listing inventory will typically continue to rise through fall.*



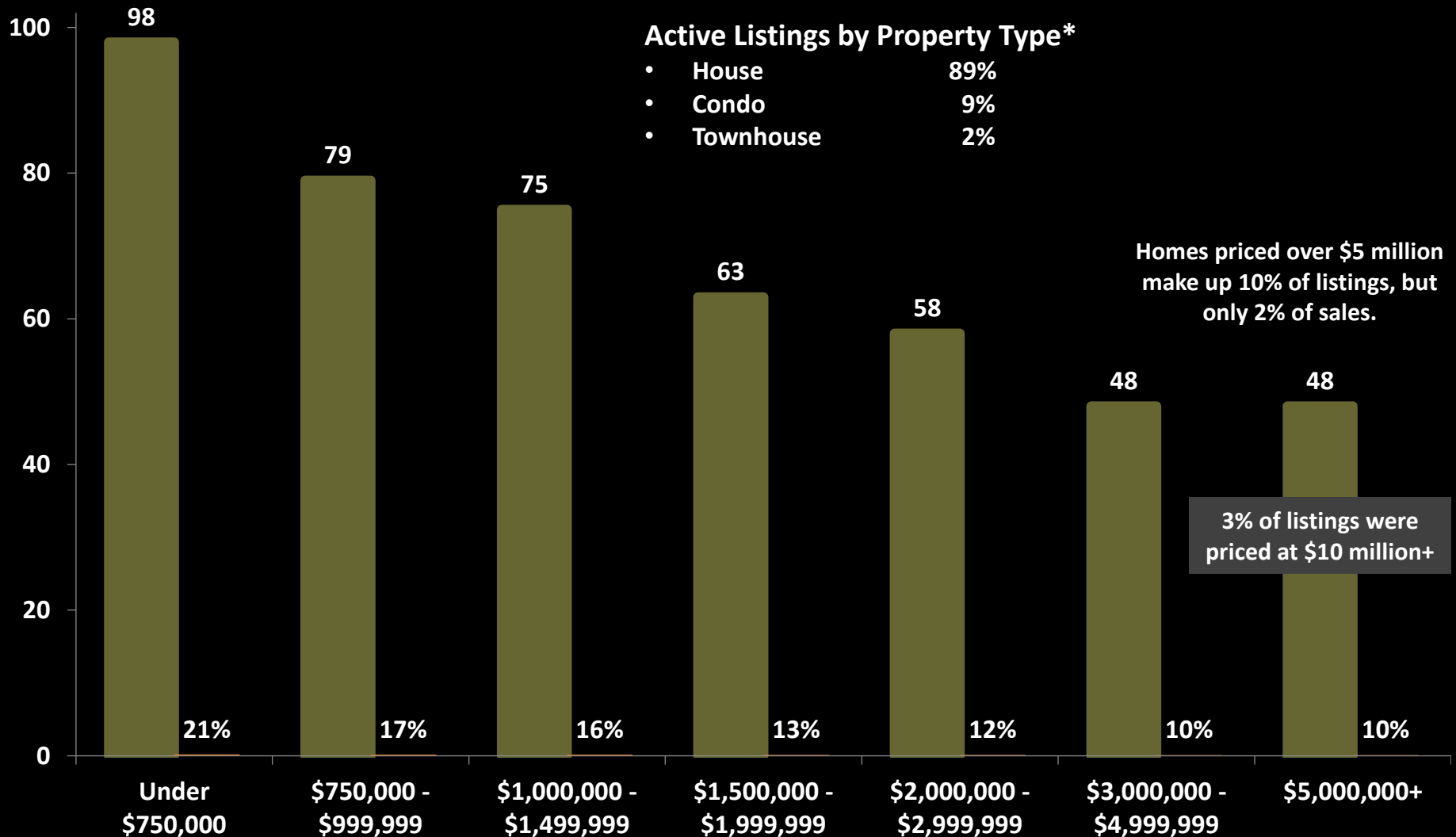
The quantity of active listings on a given day is affected by 1) the number of new listings coming on market, 2) how quickly buyers put them into contract, 3) the sustained heat of the market over time, and 4) sellers pulling their homes off the market without selling.

Updated April 1, 2026

* Active/Coming-Soon listings posted to NorCal MLS Alliance. Data from sources deemed reliable but may contain errors and subject to revision. Not all listings are posted to MLS. All numbers approximate. The number of active listings constantly changes.

Homes for Sale in Napa County

Number & Percentage of Listings by Price Segment & Property Type*



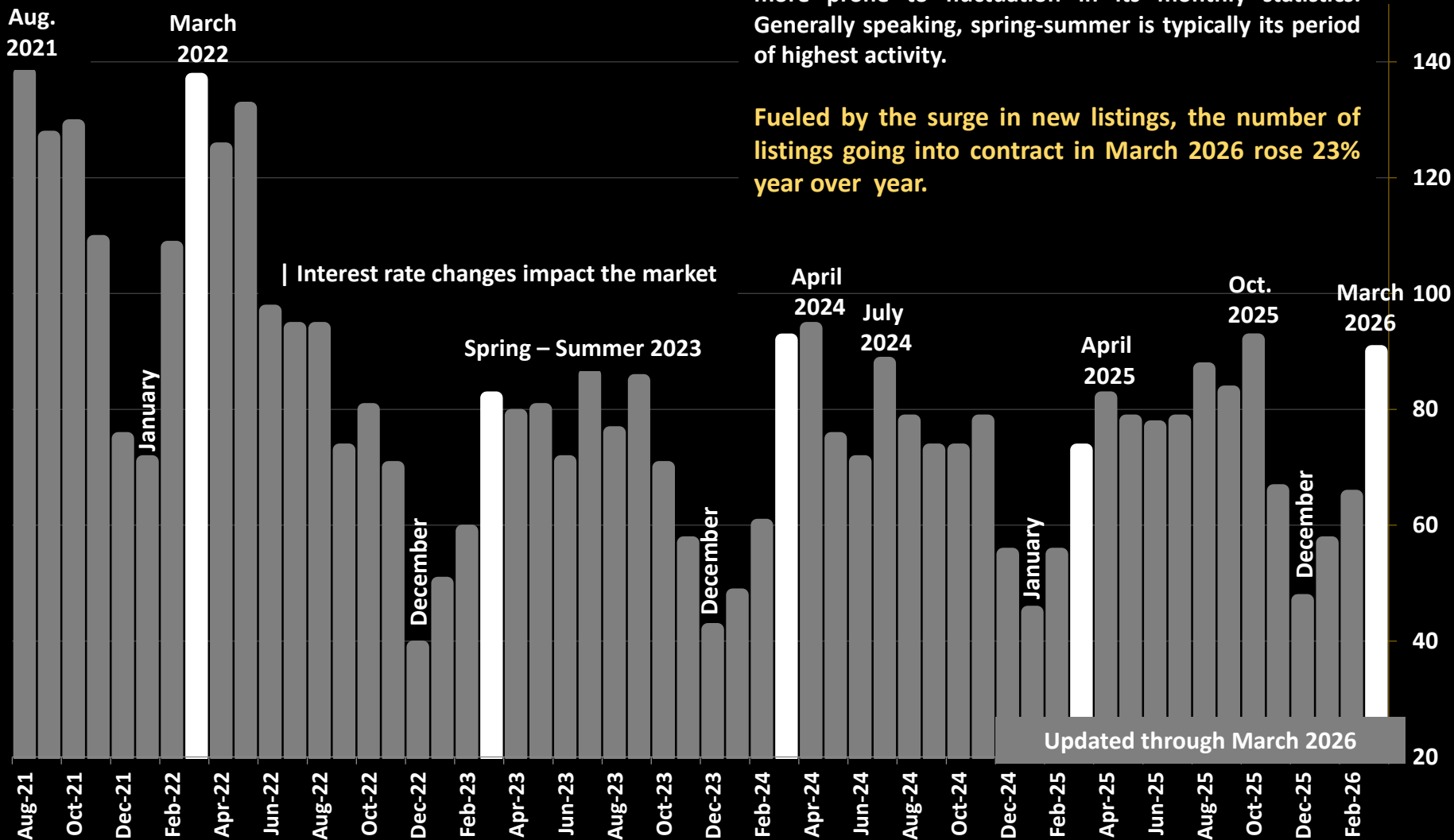
Active/coming-soon listings posted to NorCal Alliance on 3/31/26. Not all properties for sale are listed on MLS. Data derived from sources deemed reliable but may contain errors and is subject to revision. Listing counts change constantly. All numbers approximate. Percentages rounded and may not add up to 100%.

Listings Accepting Offers (Going into Contract)

Napa County Market Dynamics & Seasonality

Due to its relatively low number of sales, Napa County is more prone to fluctuation in its monthly statistics. Generally speaking, spring-summer is typically its period of highest activity.

Fueled by the surge in new listings, the number of listings going into contract in March 2026 rose 23% year over year.

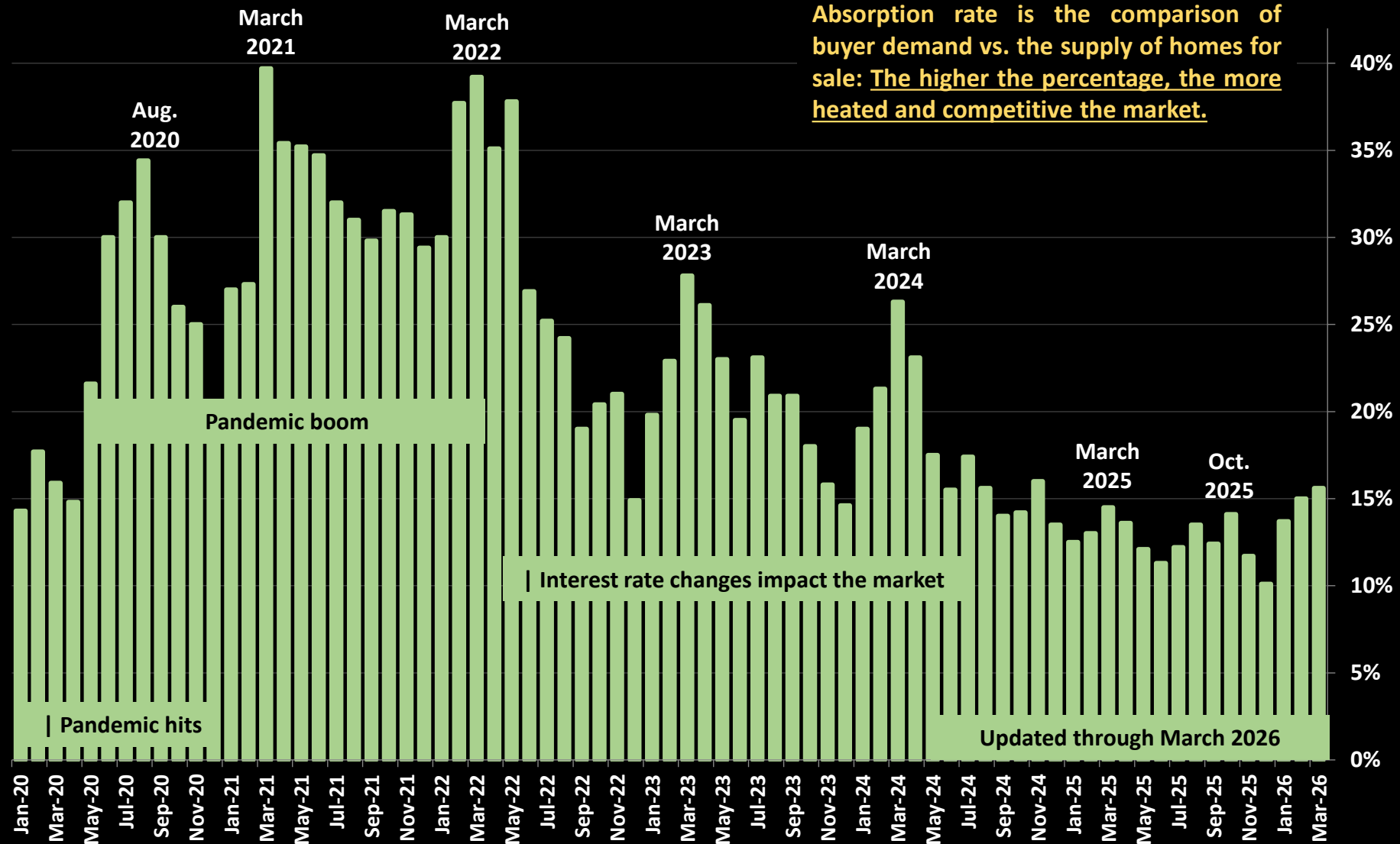


Residential activity reported to Bareis MLS, per Broker Metrics. Data from sources deemed reliable but may contain errors and subject to revision. All numbers approximate and may change with late-reported activity.



Percentage of Listings Accepting Offers

Napa County: Absorption Rate by Month



Bareis MLS reported data for houses, condos and townhouses, per Broker Metrics. Last month's data estimated using available data, may change with late reported activity. Data from sources deemed reliable but may contain errors and subject to revision. All numbers approximate.

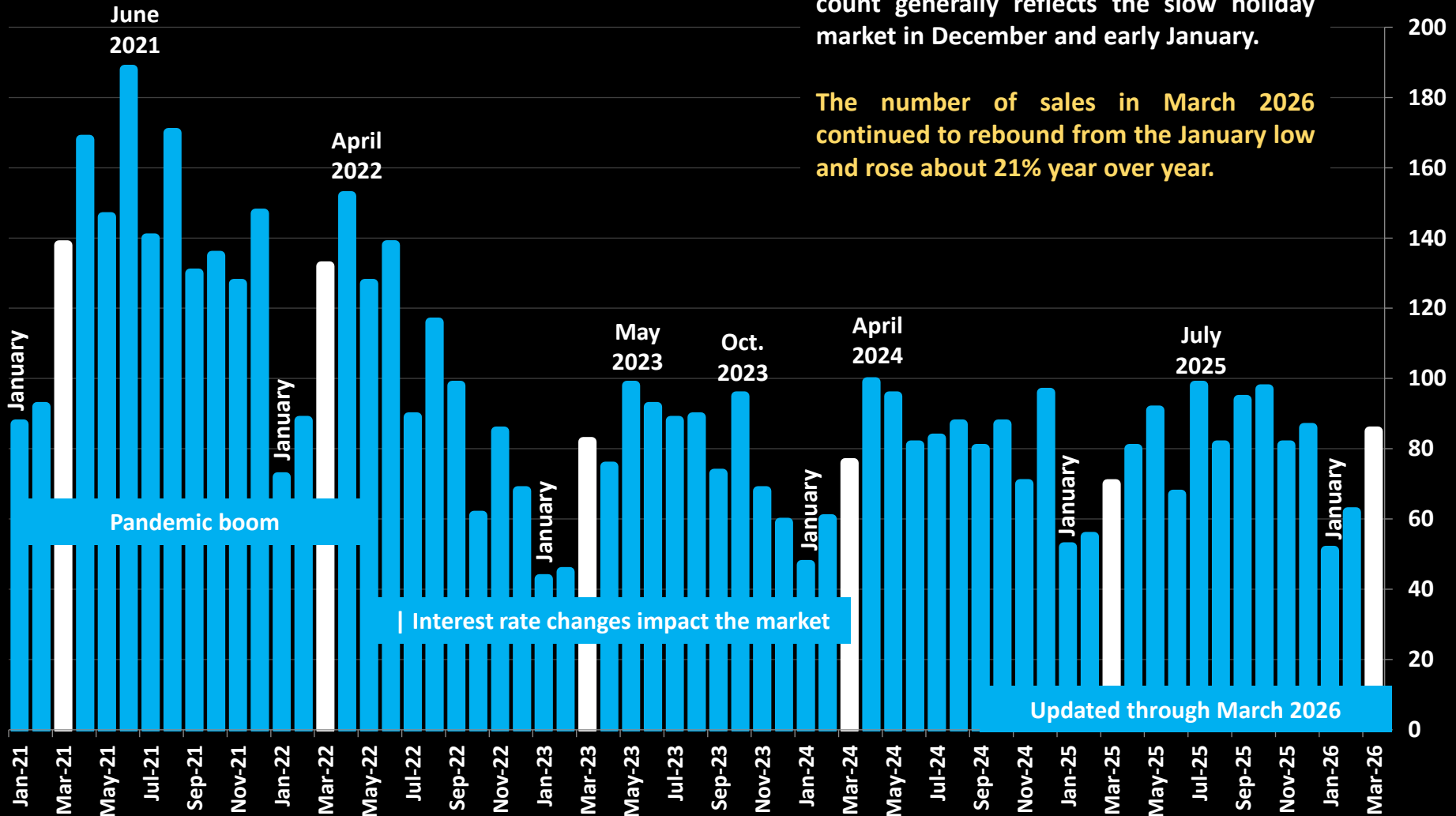


Monthly Sales Volume

Napa County Market Dynamics & Seasonality

Sales in one month mostly reflect accepted offers in the *previous* month. January's low count generally reflects the slow holiday market in December and early January.

The number of sales in March 2026 continued to rebound from the January low and rose about 21% year over year.

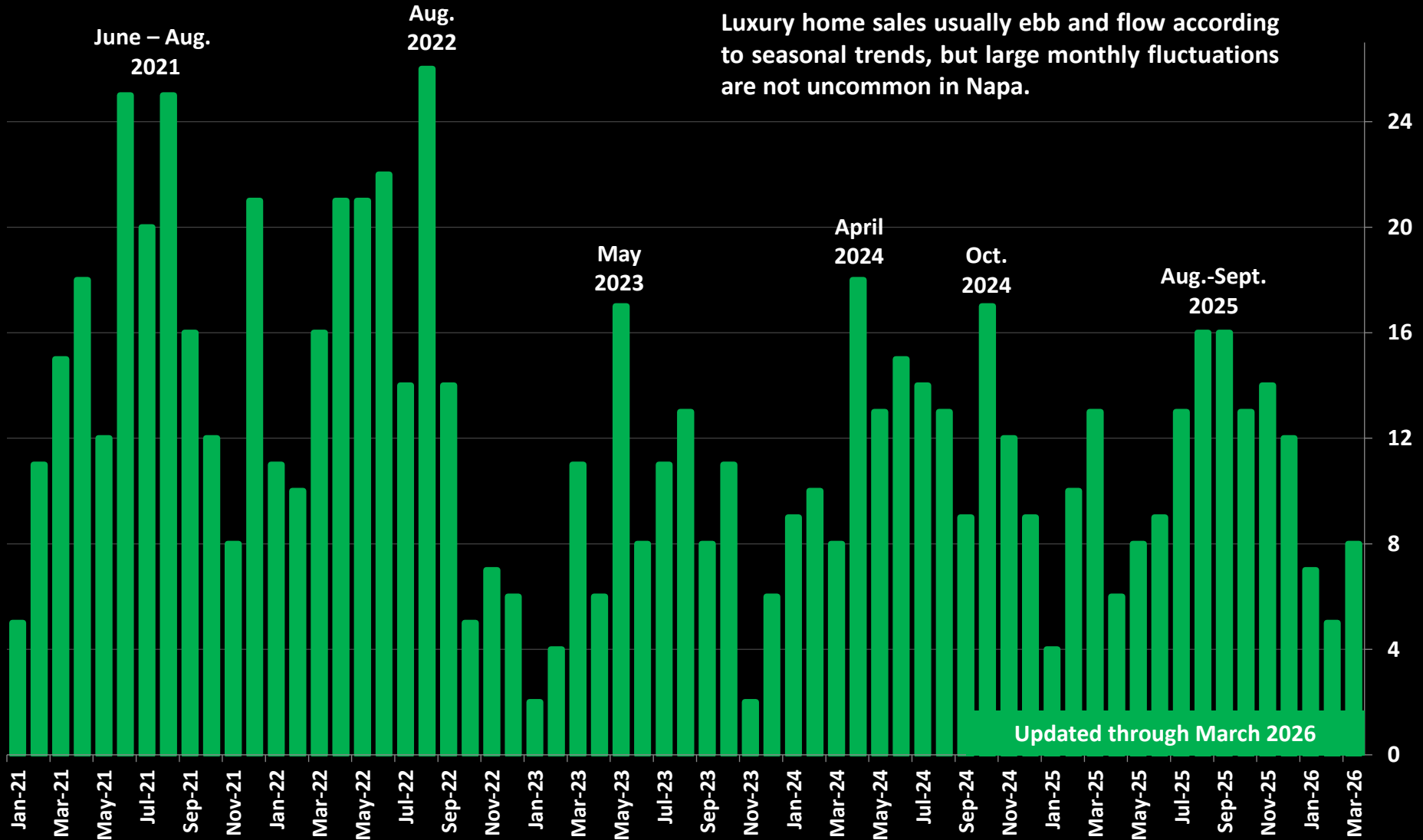


Sales of houses, condos, townhouses reported to NorCal MLS Alliance, per Infosparks. Data from sources deemed reliable but may contain errors and subject to revision. Last month estimated based on available information and may change with late reported sales. All numbers approximate.

Higher Price & Luxury Home Sales, \$2 Million+

Napa County Market Dynamics & Seasonality

Luxury home sales usually ebb and flow according to seasonal trends, but large monthly fluctuations are not uncommon in Napa.



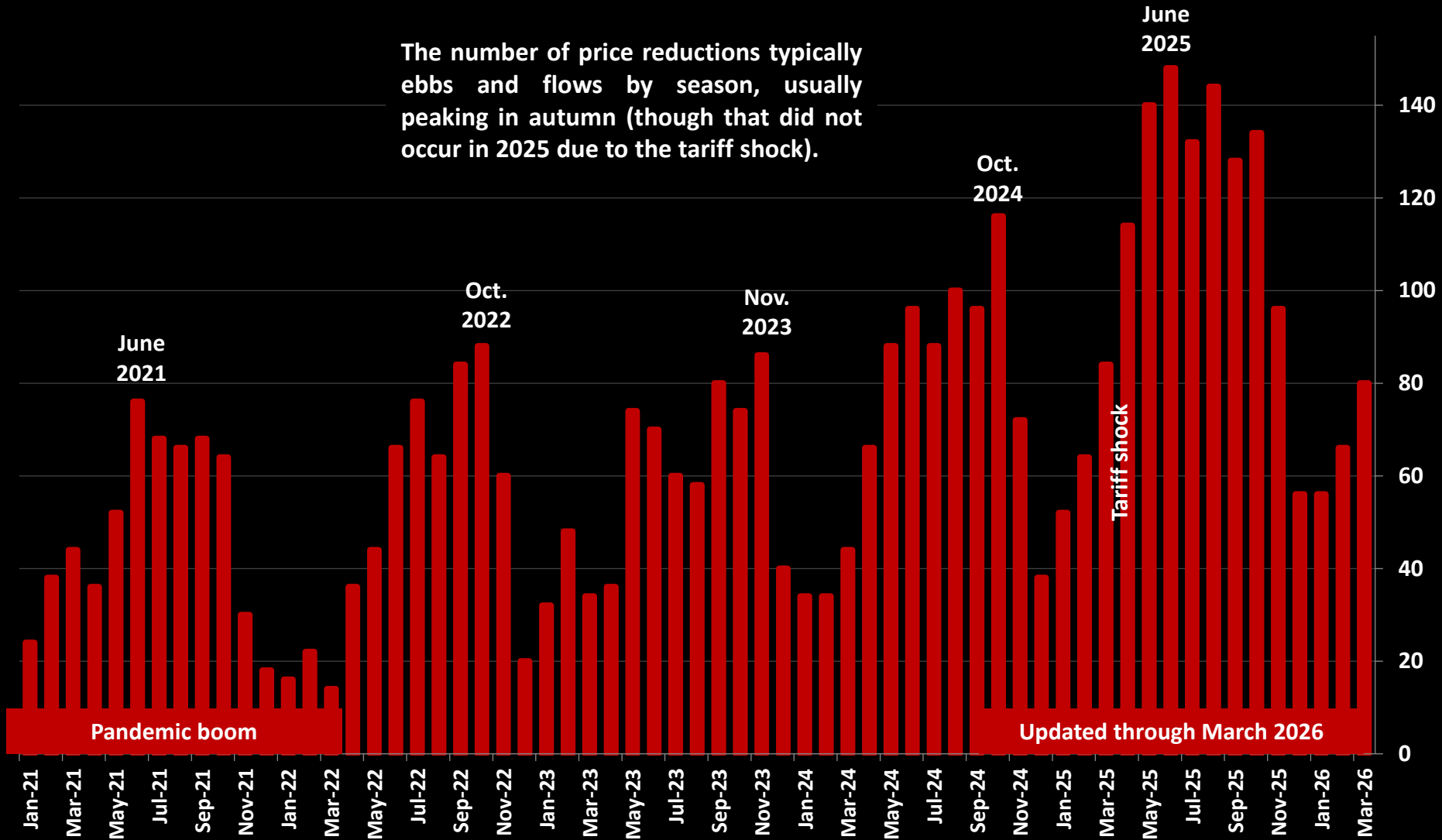
Sales of houses, condos, townhouses reported to NorCal MLS Alliance, per Infosparks. Data from sources deemed reliable but may contain errors and subject to revision. Last month estimated based on available information and may change with late reported sales. All numbers approximate.



Price Reductions on Active Listings

Napa County Market Dynamics & Seasonality

The number of price reductions typically ebbs and flows by season, usually peaking in autumn (though that did not occur in 2025 due to the tariff shock).

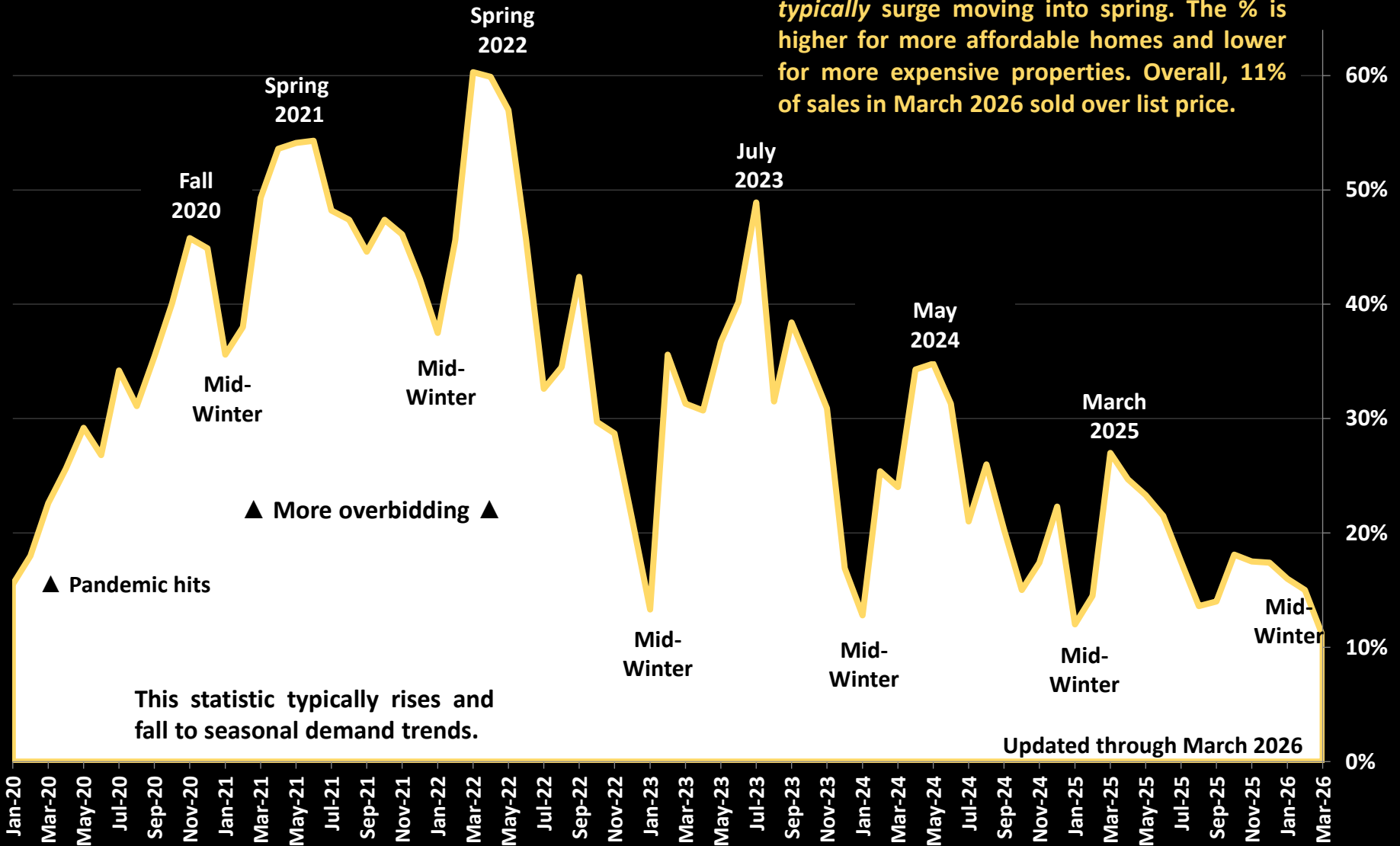


Per Realtor.com Research: <https://www.realtor.com/research/data/>, listings posted to site. Data from sources deemed reliable but may contain errors and subject to revision. All numbers approximate.

Overbidding List Prices in Napa County

Percentage of Home Sales Closing over List Price

Higher overbidding percentages signify more competition for new listings, and they typically surge moving into spring. The % is higher for more affordable homes and lower for more expensive properties. Overall, 11% of sales in March 2026 sold over list price.

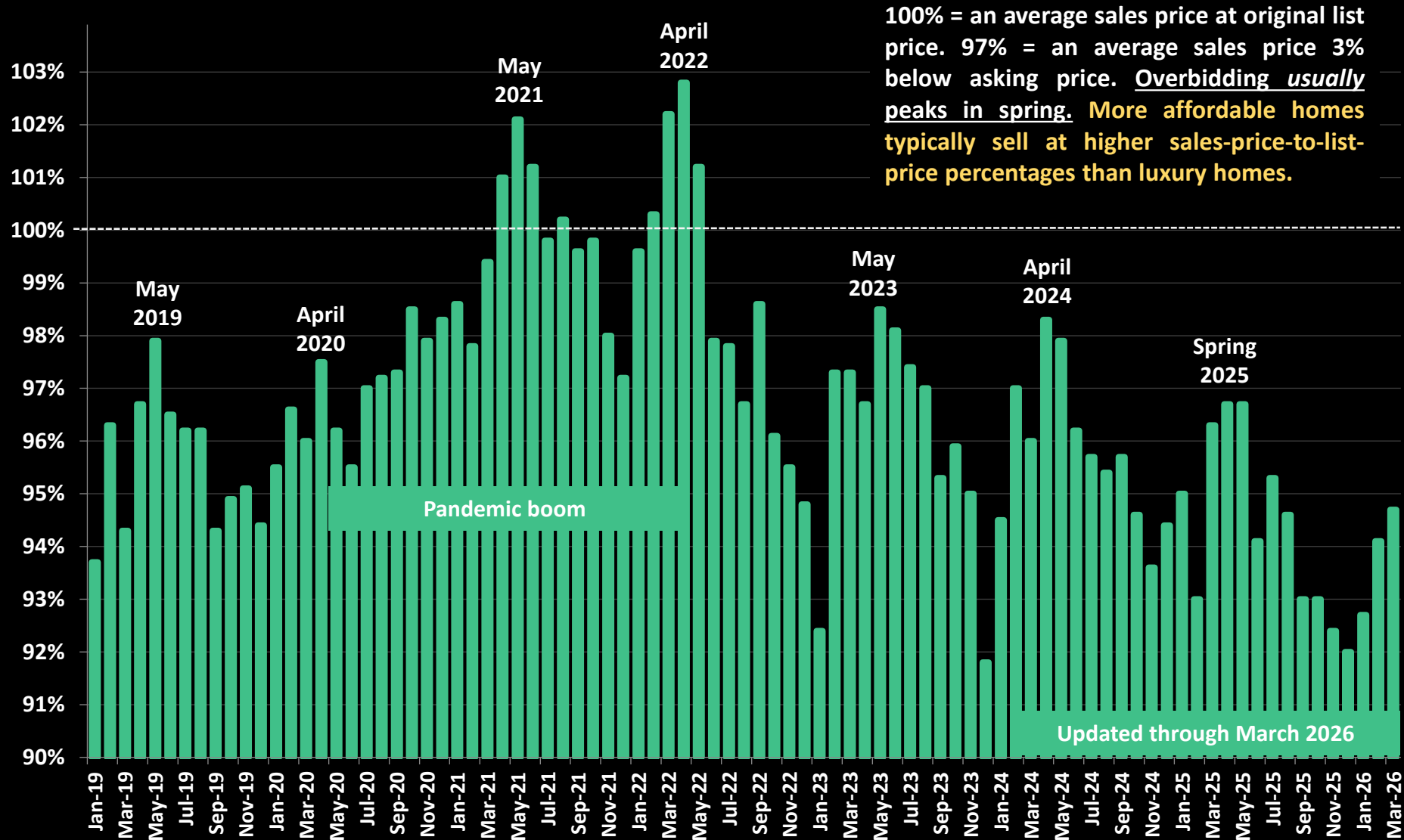


Sales data reported to NORCAL MLS® ALLIANCE, per Infosparks. Reflecting the percentage of sales closing at sales prices over the final list prices. Data from sources deemed reliable but may contain errors and subject to revision. All numbers are approximate and may change with late-reported sales.



Average Sales Price to Original List Price Percentage

Napa County Over/Under Bidding: Market Dynamics & Seasonality



Sales of houses, condos, townhouses reported to NorCal MLS Alliance, per Infosparks. Data derived from sources deemed reliable but may contain errors and subject to revision. All numbers approximate and may change with late-reported sales.

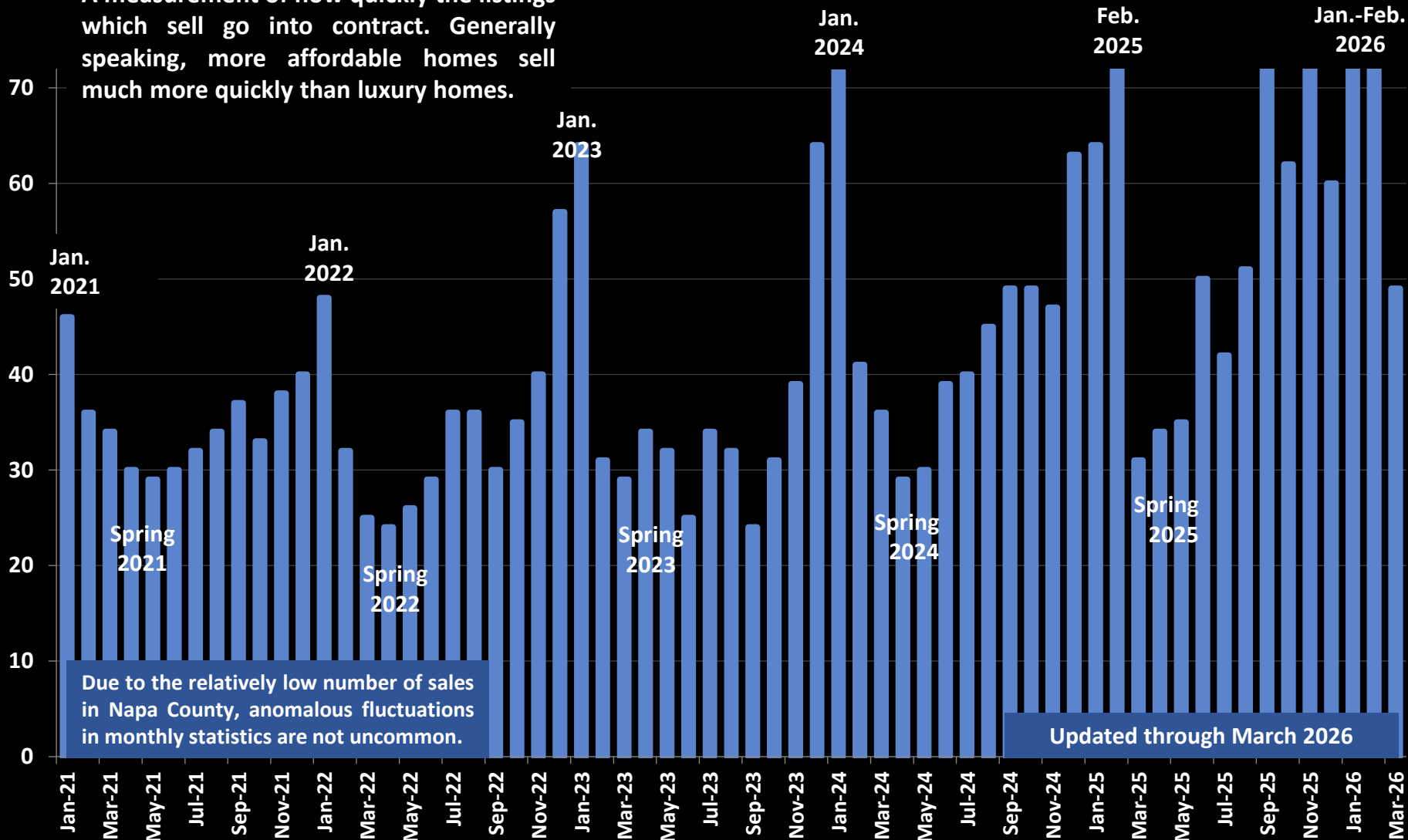


Median Days on Market – Speed of Sale

Napa County: Market Dynamics & Seasonality

Homes typically sell fastest in spring as buyers respond to the rush of new listings. In mid-winter, sales are dominated by listings that have been on the market for longer periods of time.

A measurement of how quickly the listings which sell go into contract. Generally speaking, more affordable homes sell much more quickly than luxury homes.



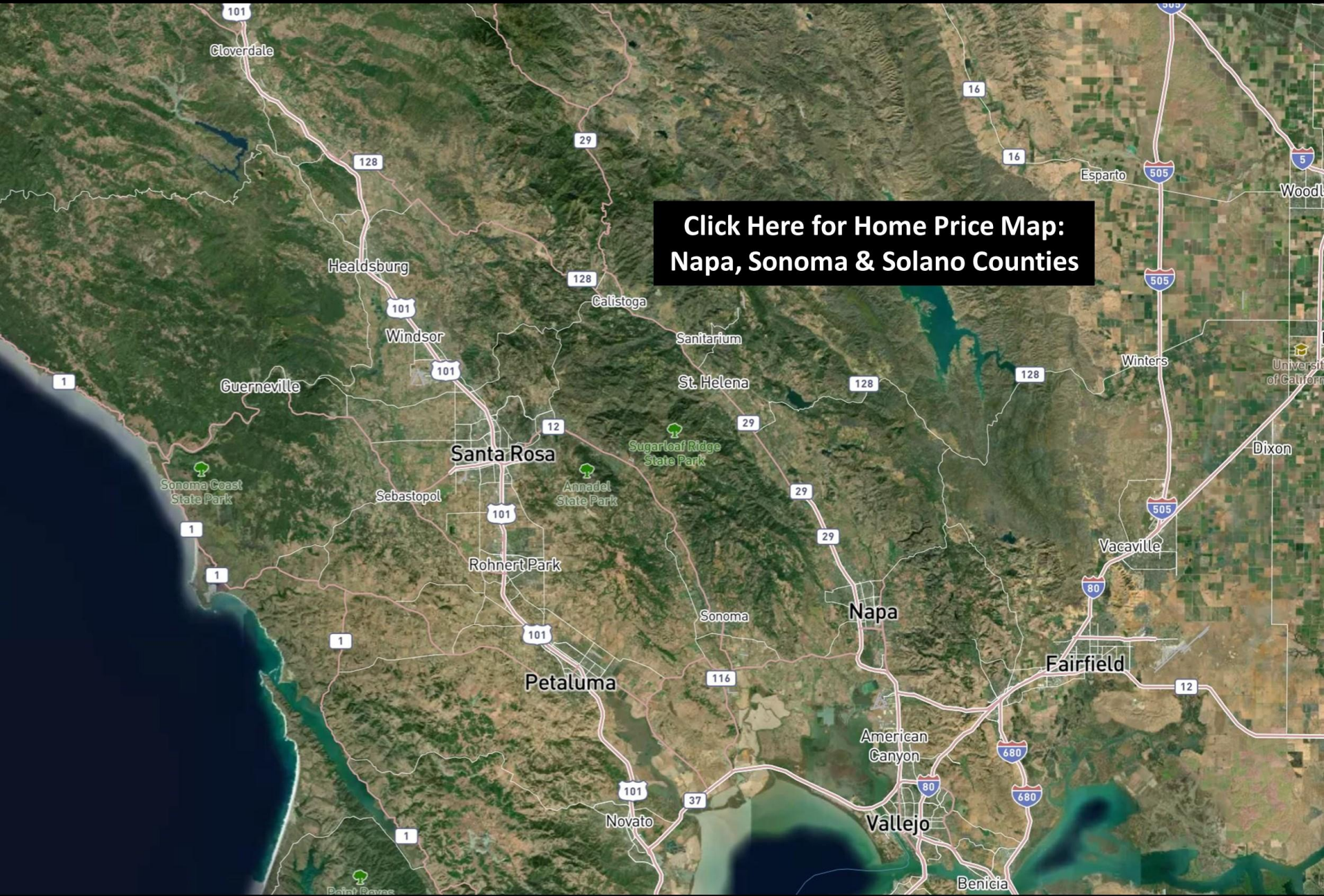
Due to the relatively low number of sales in Napa County, anomalous fluctuations in monthly statistics are not uncommon.

Updated through March 2026

Sales of houses, condos, townhouses reported to NorCal MLS Alliance, per Infosparks. Data derived from sources deemed reliable but may contain errors and subject to revision. All numbers approximate and may change with late-reported sales.



[Click Here for Home Price Map:
Napa, Sonoma & Solano Counties](#)

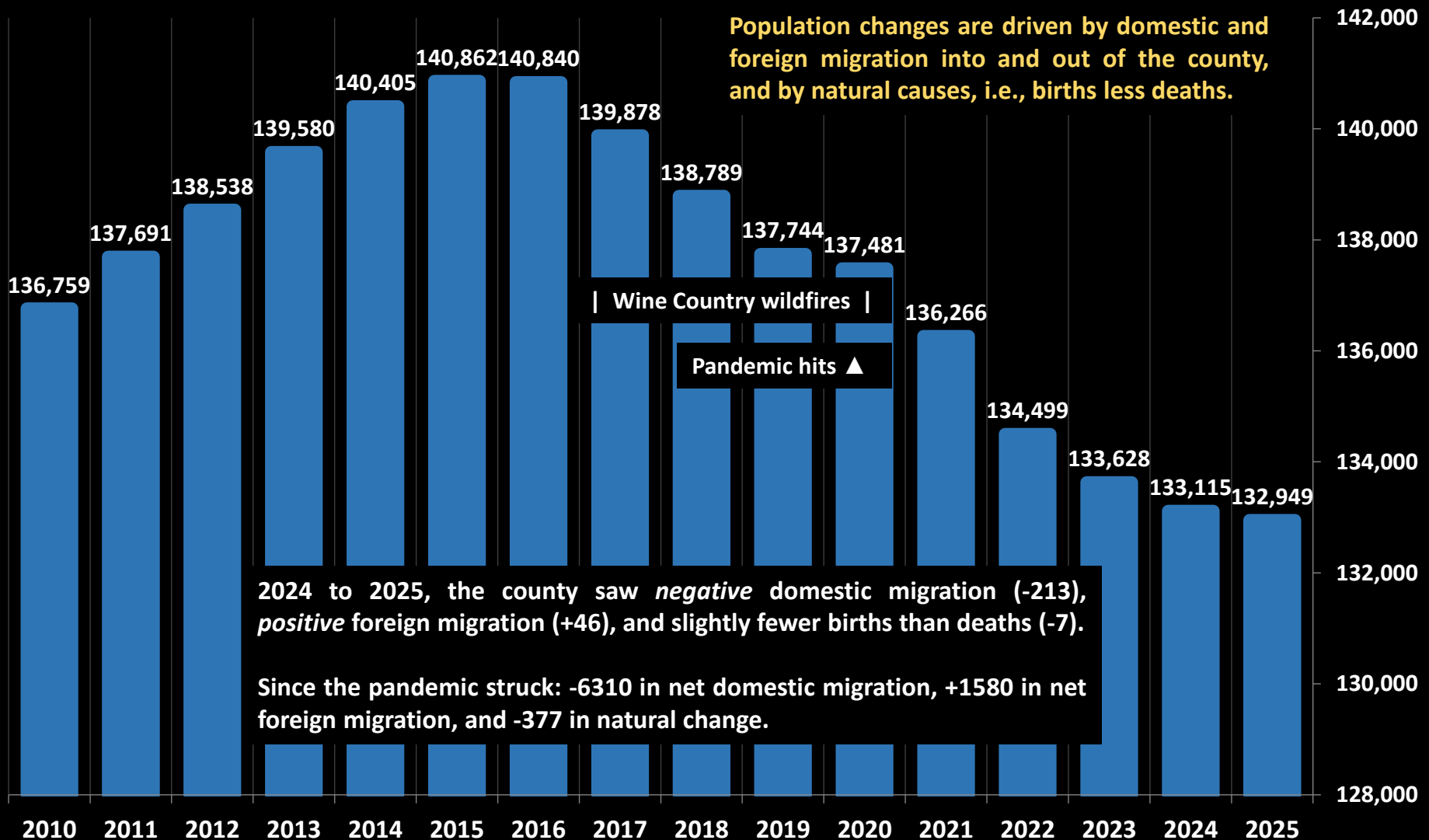


Selected Economic & Demographic Data

Napa County Population Trends since 2010

U.S. Census Estimates, July 1st to July 1st

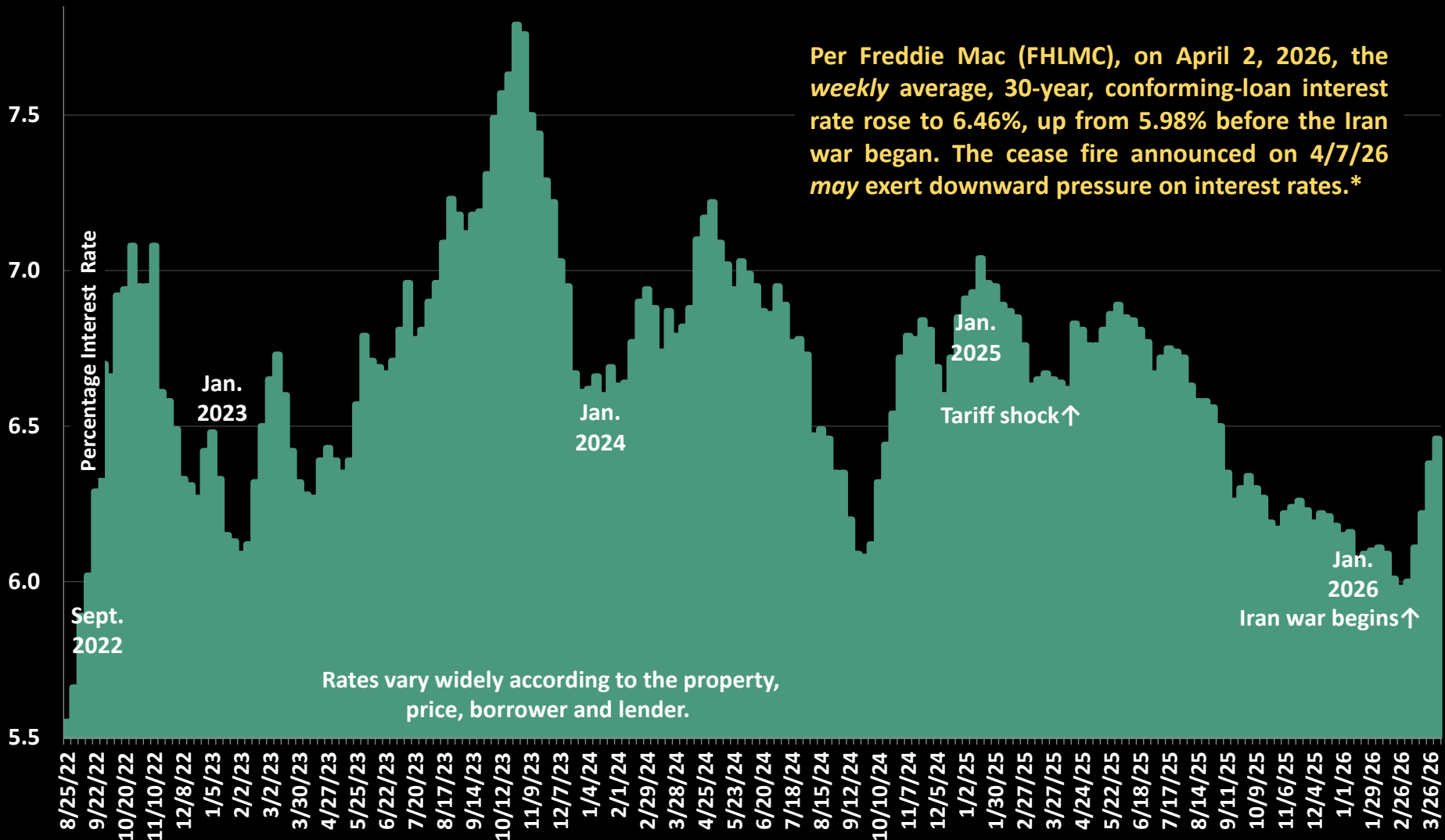
Changes measured from July 1st of previous year to July 1st of labeled year.



Estimates as of July 1 of each year. 2020-2025 data published March 26, 2026, by U.S. Census. The Census often revises numbers in subsequent estimates. All numbers to be considered approximate. Census numbers may not total perfectly due to "Population change that cannot be attributed to any specific demographic component."

Mortgage Interest Rates, August 2022 to 2026 YTD

30-Year Conforming Fixed-Rate Loans, Weekly Average Readings*



Per Freddie Mac (FHLMC), on April 2, 2026, the weekly average, 30-year, conforming-loan interest rate rose to 6.46%, up from 5.98% before the Iran war began. The cease fire announced on 4/7/26 may exert downward pressure on interest rates.*

Rates vary widely according to the property, price, borrower and lender.

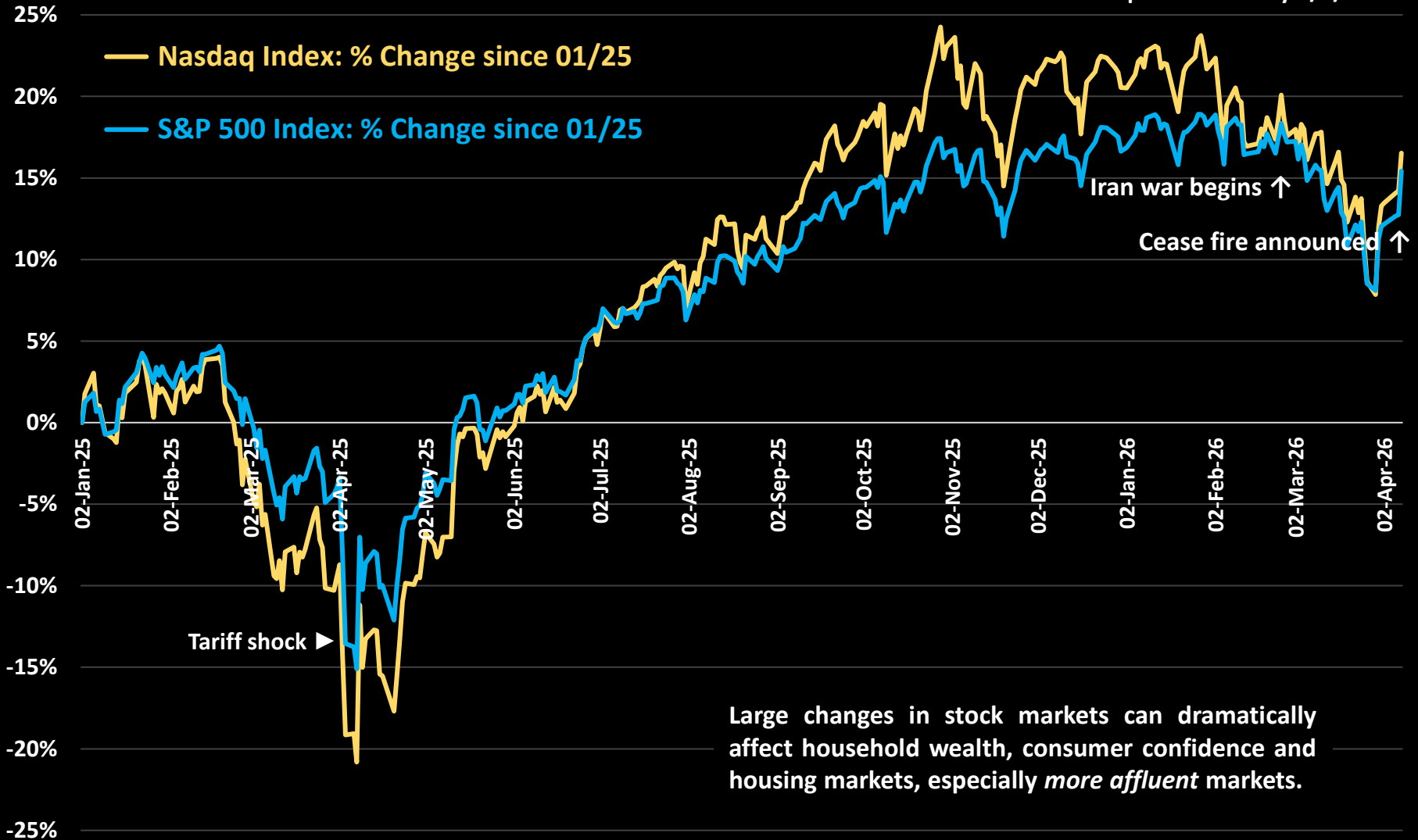
*Freddie Mac (FHLMC), 30-Year Fixed Rate Mortgage Weekly Average: <https://www.freddiemac.com/pmms>. Data from sources deemed reliable. Different sources of mortgage data sometimes vary in their determinations of daily and weekly rates. Daily Average Rate from Mortgage News Daily. All numbers approximate.



Financial Markets, 2025 – 2026 YTD

Percentage Increases in S&P 500 & Nasdaq since 1/2/25

Updated mid-day 4/8/26



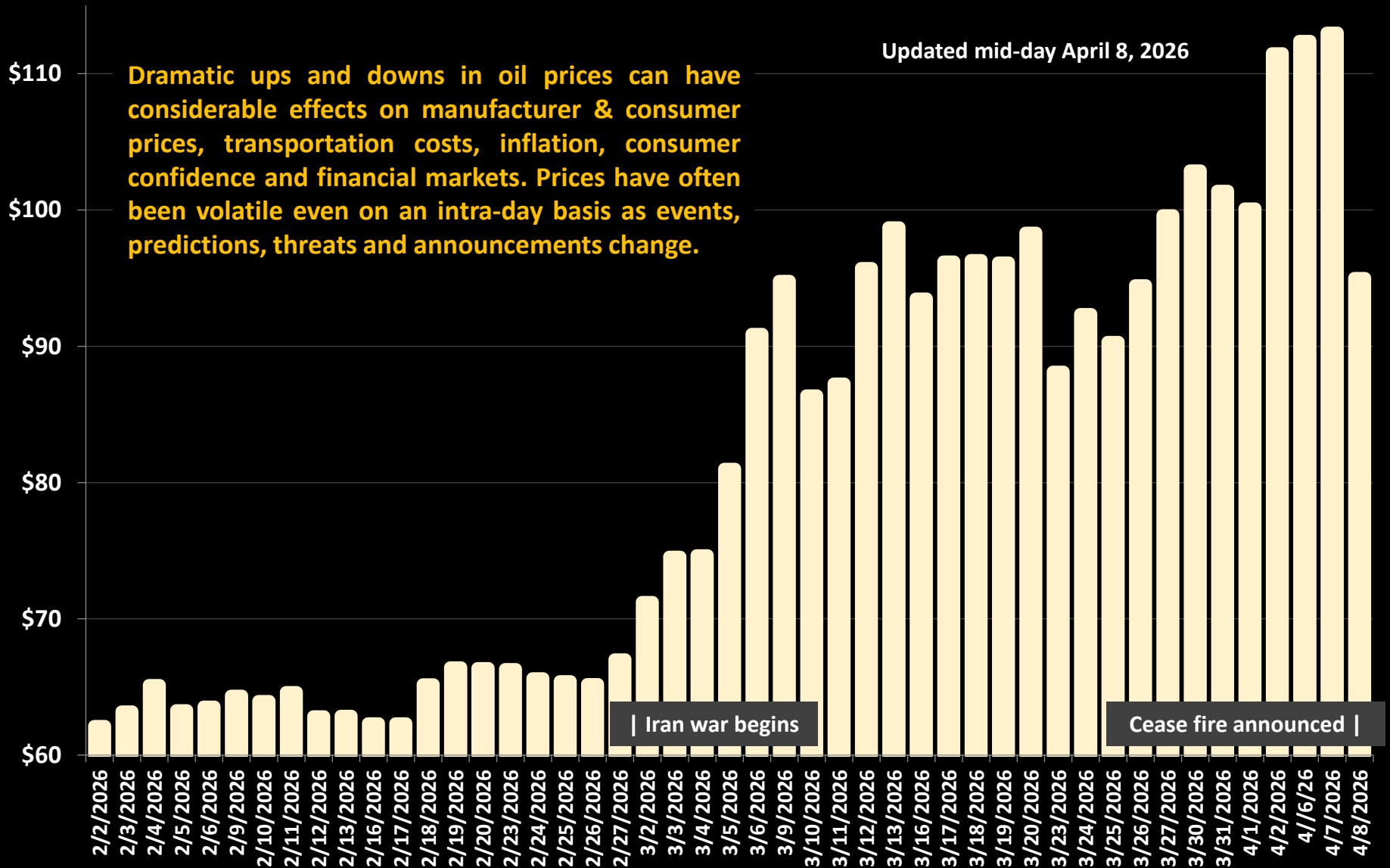
Large changes in stock markets can dramatically affect household wealth, consumer confidence and housing markets, especially *more affluent* markets.

Data per MarketWatch.com, <https://www.marketwatch.com/investing/index/comp/download-data> and <https://www.marketwatch.com/investing/index/spx/download-data>. Data from source deemed reliable but may contain errors and subject to revision. Financial market values change constantly and all numbers to be considered approximate.

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Crude Oil, Price per Barrel

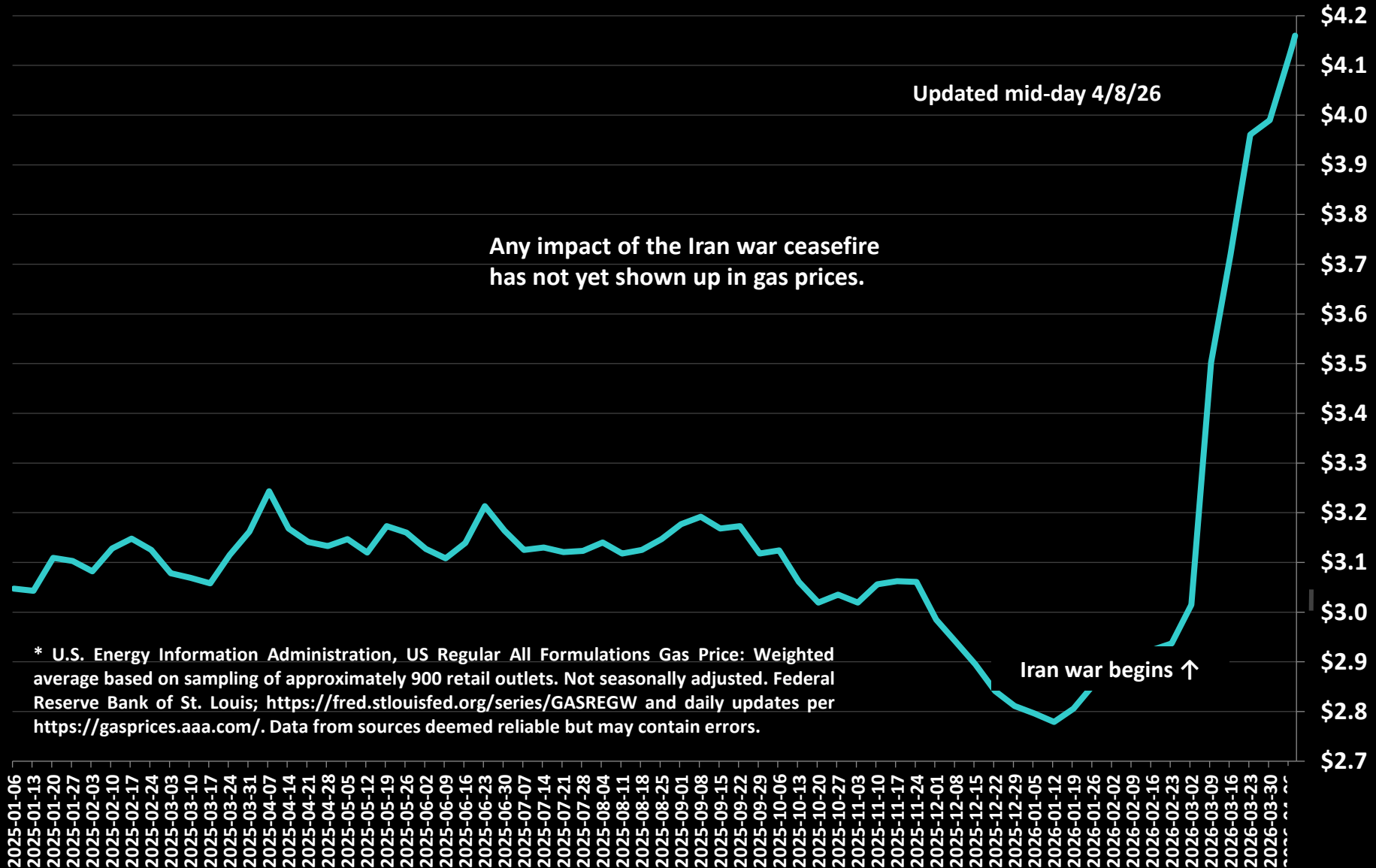
Since February 2, 2026*



*Per Yahoo! Finance, <https://finance.yahoo.com/quote/CL%3DF/history/>. Data from sources deemed reliable but may contain errors. All numbers should be considered approximate.

The Price of Gas, 2025 – 2026 YTD

U.S. Average, Price per Gallon, by Week*



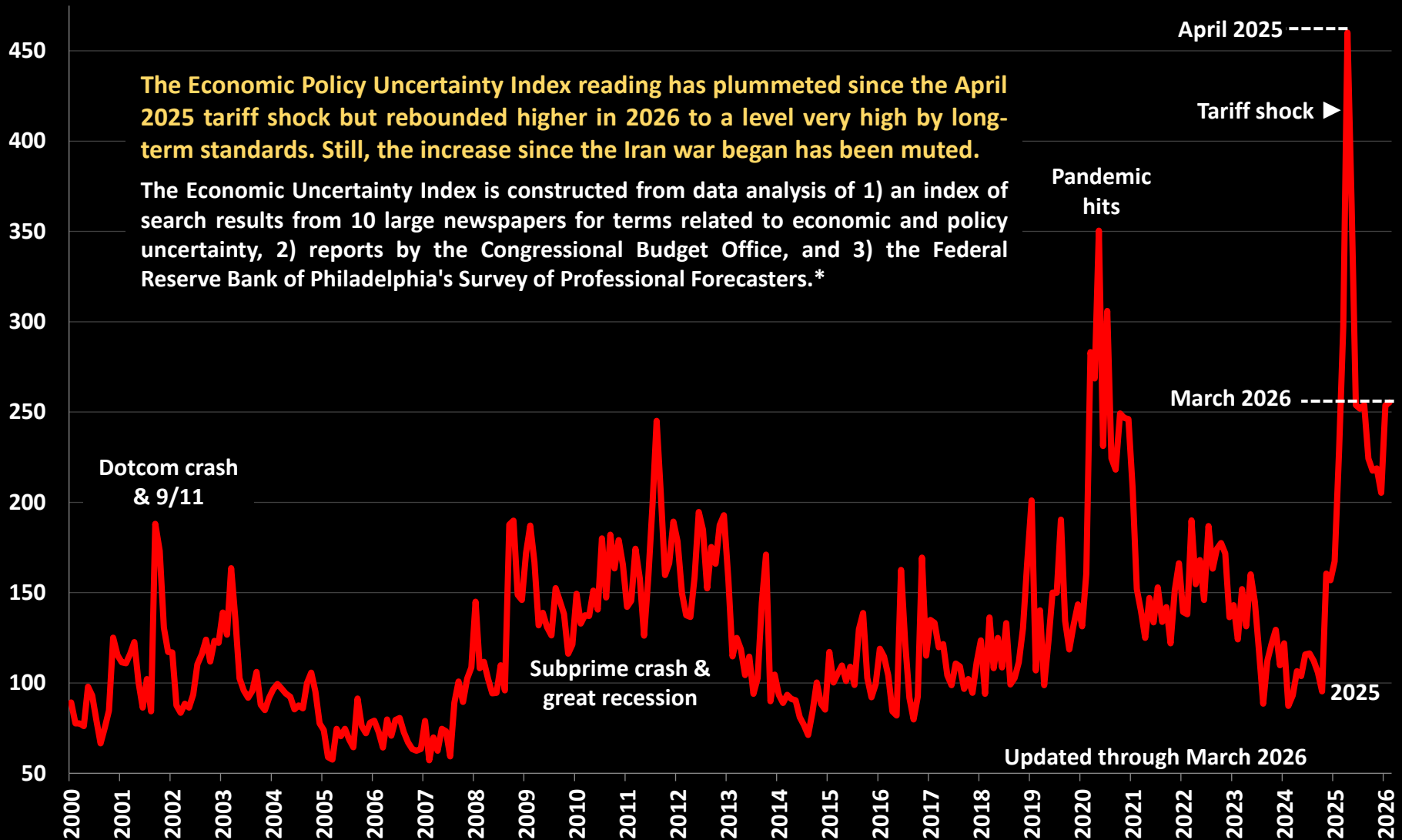
* U.S. Energy Information Administration, US Regular All Formulations Gas Price: Weighted average based on sampling of approximately 900 retail outlets. Not seasonally adjusted. Federal Reserve Bank of St. Louis; <https://fred.stlouisfed.org/series/GASREGW> and daily updates per <https://gasprices.aaa.com/>. Data from sources deemed reliable but may contain errors.

Economic Policy Uncertainty Index*

By Month since January 2000

The Economic Policy Uncertainty Index reading has plummeted since the April 2025 tariff shock but rebounded higher in 2026 to a level very high by long-term standards. Still, the increase since the Iran war began has been muted.

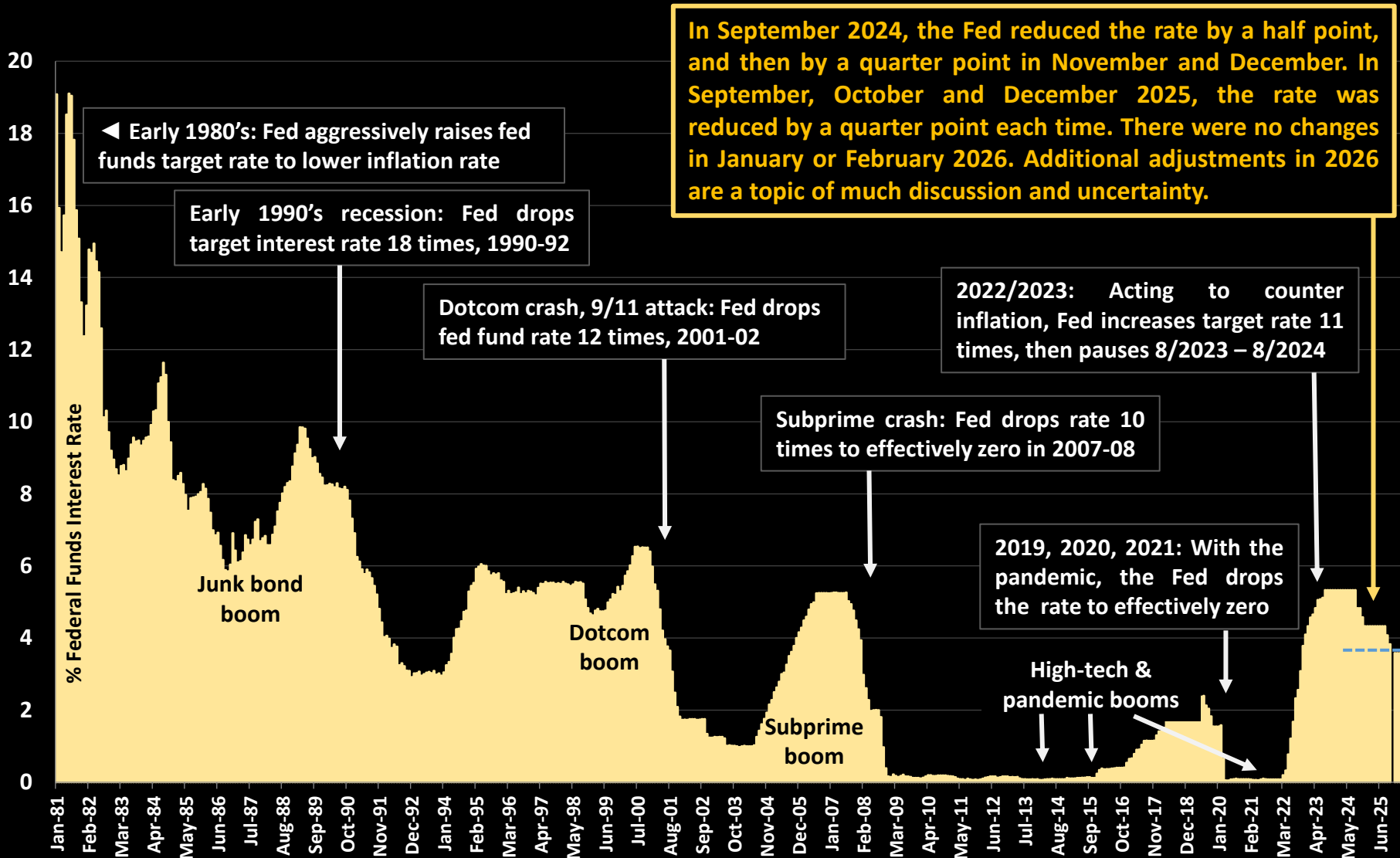
The Economic Uncertainty Index is constructed from data analysis of 1) an index of search results from 10 large newspapers for terms related to economic and policy uncertainty, 2) reports by the Congressional Budget Office, and 3) the Federal Reserve Bank of Philadelphia's Survey of Professional Forecasters.*



*Source: 'Measuring Economic Policy Uncertainty' by Scott Baker, Nicholas Bloom and Steven J. Davis, 3-component index, www.PolicyUncertainty.com, https://www.policyuncertainty.com/us_monthly.html. Data from sources deemed reliable, but numbers to be considered approximate and subject to revision.

Federal Funds Interest Rate since 1981 & Economic Interventions by Federal Reserve Bank*

Updated March 18, 2026



* Per Federal Reserve Bank of St. Louis and New York; <https://fred.stlouisfed.org/series/FEDFUNDS>;
Last reading per <https://www.newyorkfed.org/markets/reference-rates/effr>. Other data referenced from sources deemed reliable but may contain errors and subject to revision.

Statistics are generalities, essentially summaries of widely disparate data generated by dozens, hundreds or thousands of unique, individual sales occurring within different time periods. They are best seen not as precise measurements, but as broad, comparative indicators, with reasonable margins of error. Anomalous fluctuations in statistics are not uncommon, especially in smaller, expensive market segments. Last period data should be considered estimates that may change with late-reported data. Different analytics programs sometimes define statistics – such as “active listings,” “days on market,” and “months supply of inventory” – differently: what is most meaningful are not specific calculations but the *trends* they illustrate. Most listing and sales data derives from the local or regional multi-listing service (MLS) of the area specified in the analysis, but not all listings or sales are reported to MLS and these won’t be reflected in the data. “Homes” signifies real-property, single-household housing units: houses, condos, co-ops, townhouses, duets and TICs (but not mobile homes), as applicable to each market. City/town names refer specifically to the named cities and towns, unless otherwise delineated. Multi-county metro areas will be specified as such. Data from sources deemed reliable but may contain errors and subject to revision. All numbers to be considered approximate.

Many aspects of value cannot be adequately reflected in median and average statistics: curb appeal, age, condition, amenities, views, lot size, quality of outdoor space, “bonus” rooms, additional parking, quality of location *within* the neighborhood, and so on. How any of these statistics apply to any particular home is unknown without a specific comparative market analysis.

Median Sales Price is that price at which half the properties sold for more and half for less. It may be affected by seasonality, “unusual” events, or changes in inventory and buying trends, as well as by changes in fair market value. The median sales price for an area will often conceal an enormous variety of sales prices in the underlying individual sales.

Dollar per Square Foot is based upon the home’s interior living space and does not include garages, unfinished attics and basements, rooms built without permit, patios, decks or yards (though all those can add value to a home). These figures are usually derived from appraisals or tax records but are sometimes unreliable (especially for older homes) or unreported altogether. The calculation can only be made on those home sales that reported square footage.

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