



2025 DECEMBER

CITY OF GUELPH

Real Estate Market Report



ROYAL CITY REALTY
BROKERAGE

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Disclaimer:

Please note that we have recently transitioned to a new board and reporting system. While we strive to ensure that the information provided in this market report is as accurate and up-to-date as possible, there may be occasional discrepancies or errors in the data.

OVERVIEW

BALANCED MARKET

The City of Guelph's real estate market remained balanced this period, despite softer sales activity and rising inventory. The median sale price declined 9.15% to \$685,000, while the average sale price fell 6.06% to \$720,136. Sales volume dropped 35.87% to \$51.13M, driven by a 31.73% decrease in unit sales to 71 transactions. New listings rose 14.58% to 110, and expired listings increased 29.09% to 71, adding more choice for buyers while encouraging strategic pricing from sellers. With a unit sales-to-listings ratio of 64.55%, down 43.79% year over year, conditions continue to reflect a balanced market.



December year-over-year sales volume of \$51,129,665

Down -35.87% from 2024's \$79,726,200 with unit sales of 71 down -31.73% from last December's 104. New listings of 110 are up +14.58% from a year ago, with the sales/listing ratio of 64.55% down -43.79%.



Year-to-date sales volume of \$1,308,131,902

Down -5.24% from 2024's \$1,380,499,886 with unit sales of 1654 down from 1726 in 2024. New listings of 3,838 are up +20.35% from a year ago, with the sales/listing ratio of 43.10% down -11.03%.



Year-to-date average sale price of \$782,831

Down from \$792,382 year ago with median sale price of \$759,000 down from \$762,750 one year ago. Average days-on-market of 32 is up 5 days from last year.

DECEMBER NUMBERS

Median Sale Price

\$685,000

-9.15%

Average Sale Price

\$720,136

-6.06%

Sales Volume

\$51,129,665

-35.87%

Unit Sales

71

-31.73%

New Listings

110

+14.58%

Expired Listings

71

+29.09%

Unit Sales/Listings Ratio

64.55%

-43.79%

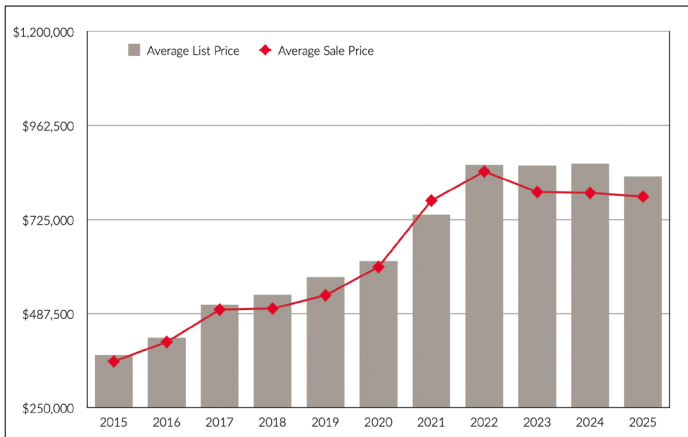
*Year-over-year comparison
(December 2025 vs. December 2024)*

THE MARKET IN DETAIL

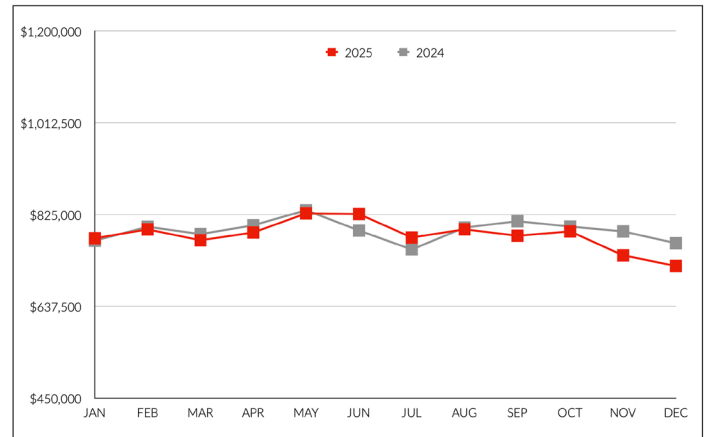
	2023	2024	2025	2024-2025
YTD Volume Sales	\$1,318,827,262	\$1,380,499,886	\$1,308,131,902	-5.24%
YTD Unit Sales	1,626	1,726	1,654	-4.17%
YTD New Listings	2,721	3,189	3,838	+20.35%
YTD Sales/Listings Ratio	59.76%	54.12%	43.10%	-11.03%
YTD Expired Listings	196	304	503	+65.46%
Monthly Volume Sales	\$46,973,399	\$79,726,200	\$51,129,665	-35.87%
Monthly Unit Sales	63	104	71	-31.73%
Monthly New Listings	69	96	110	+14.58%
Monthly Sales/Listings Ratio	91.30%	108.33%	64.55%	-43.79%
Monthly Expired Listings	51	55	71	+29.09%
YTD Sales: \$0-\$199K	1	0	0	No Change
YTD Sales: \$200k-349K	5	9	14	+55.56%
YTD Sales: \$350K-\$549K	240	232	263	+13.36%
YTD Sales: \$550K-\$749K	485	559	496	-11.27%
YTD Sales: \$750K-\$999K	613	660	624	-5.45%
YTD Sales: \$1M - \$2M	283	265	251	-5.28%
YTD Sales: \$2M+	3	6	6	No Change
YTD Average Days-On-Market	21.50	27.42	32.17	+17.33%
YTD Average Sale Price	\$794,615	\$792,382	\$782,831	-1.21%
YTD Median Sale Price	\$762,500	\$762,750	\$759,000	-0.49%

City of Guelph MLS Sales and Listing Summary
2023 vs. 2024 vs. 2025

AVERAGE SALE PRICE

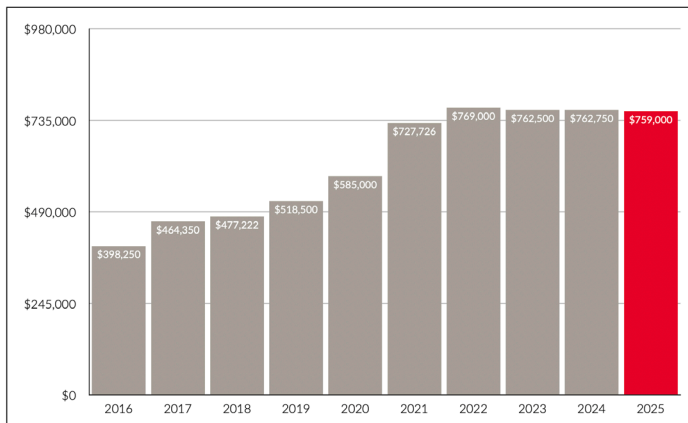


Year-Over-Year

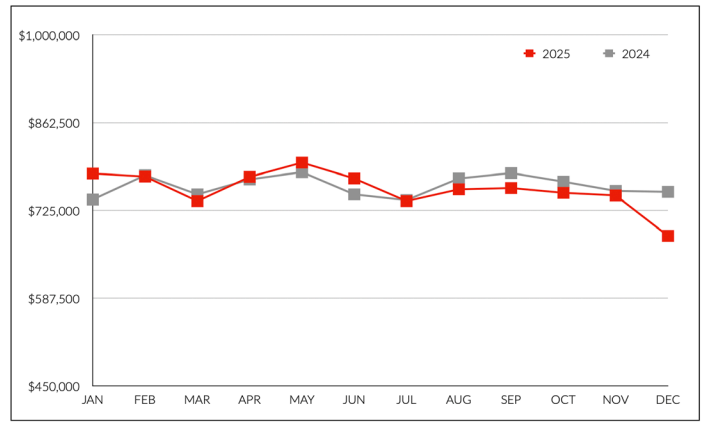


Month-Over-Month 2024 vs. 2025

MEDIAN SALE PRICE



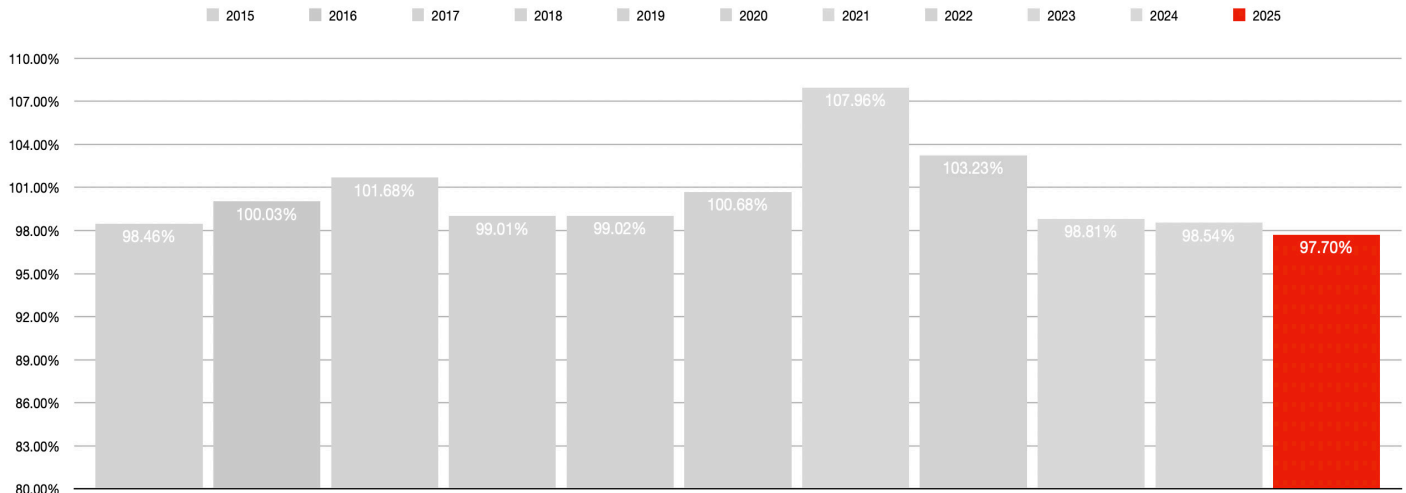
Year-Over-Year



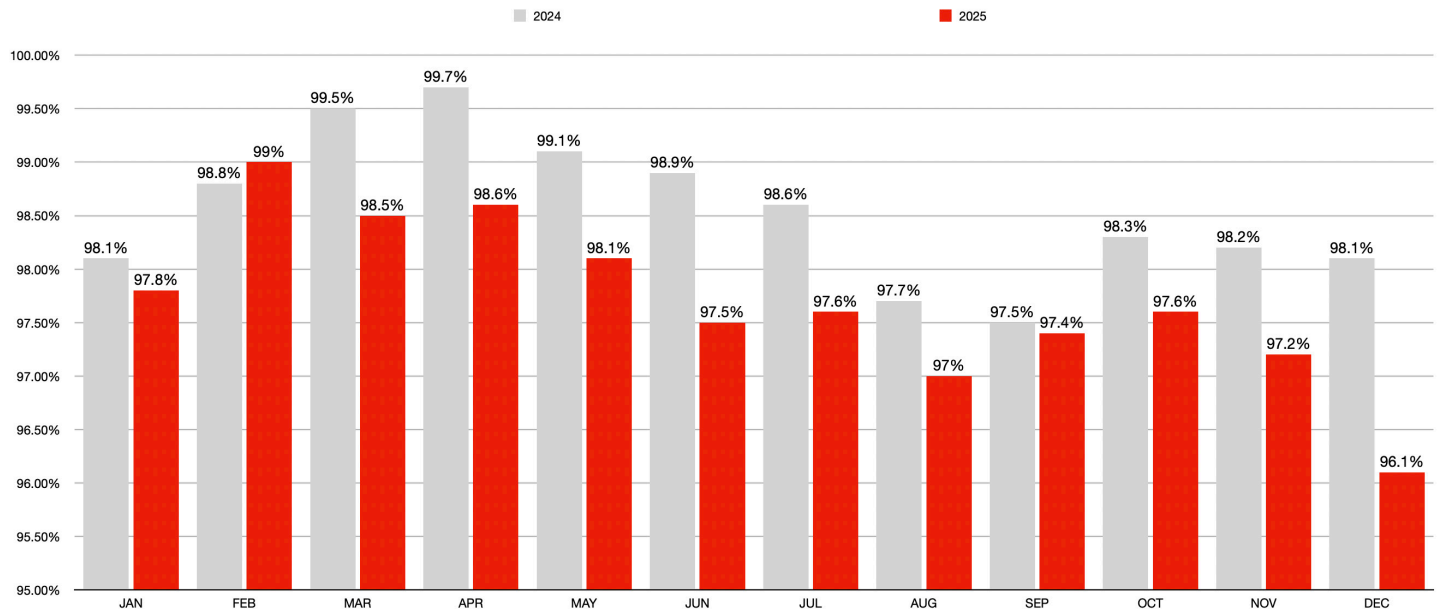
Month-Over-Month 2024 vs. 2025

* Median sale price is based on residential sales (including freehold and condominiums).

SALE PRICE VS. LIST PRICE RATIO

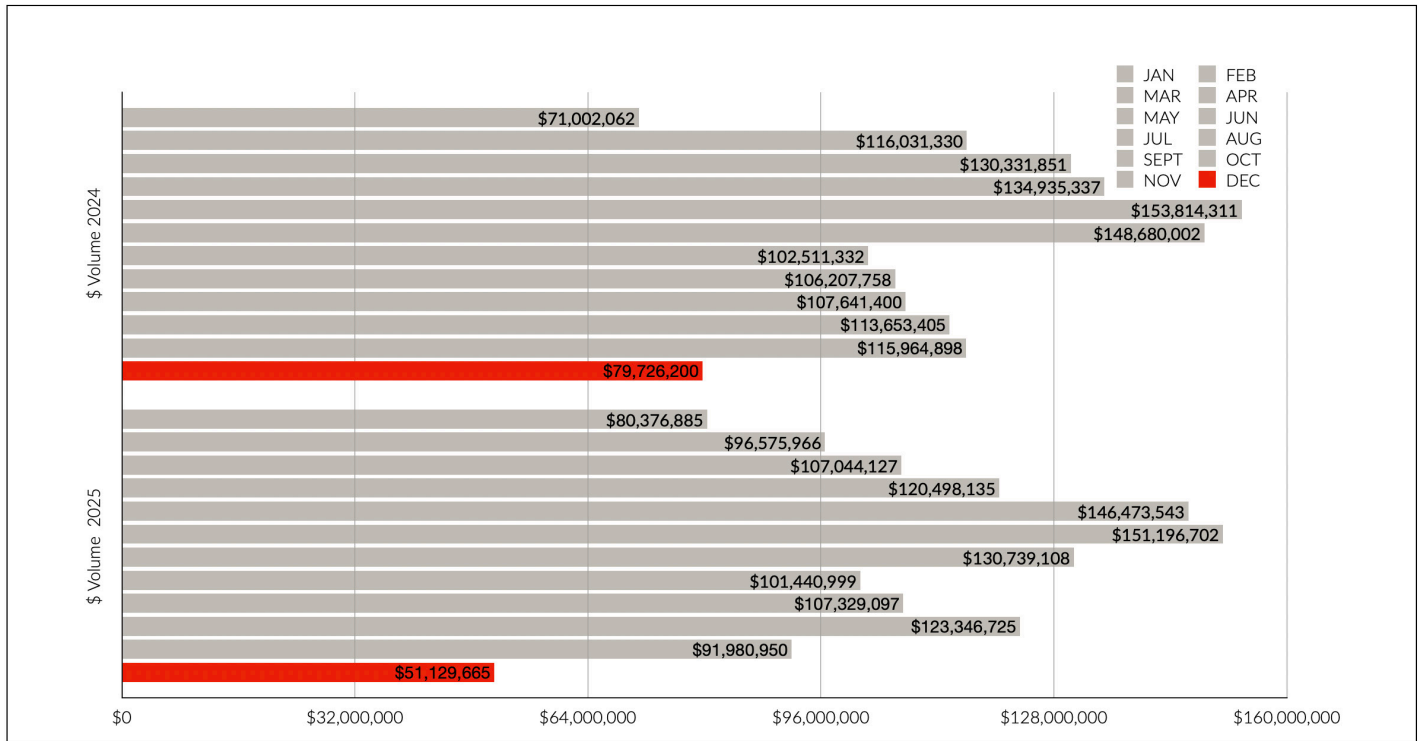


Year-Over-Year

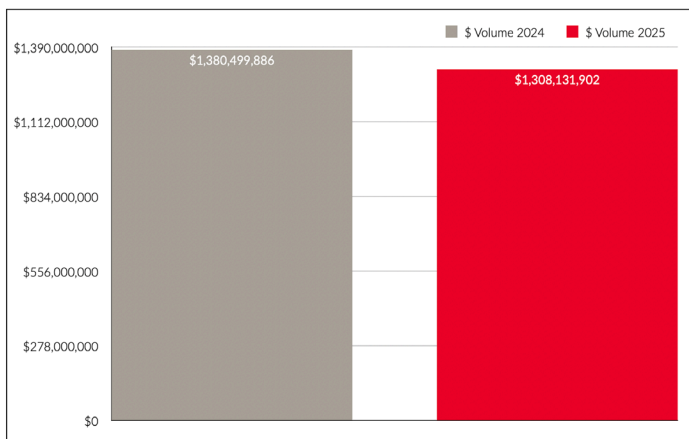


Month-Over-Month 2024 vs. 2025

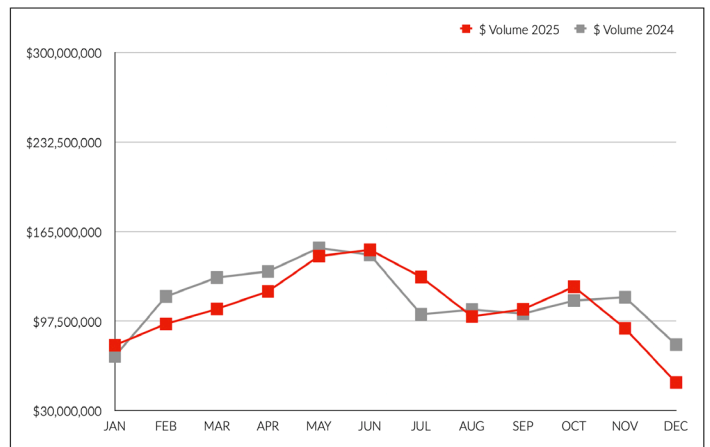
DOLLAR VOLUME SALES



Monthly Comparison 2024 vs. 2025

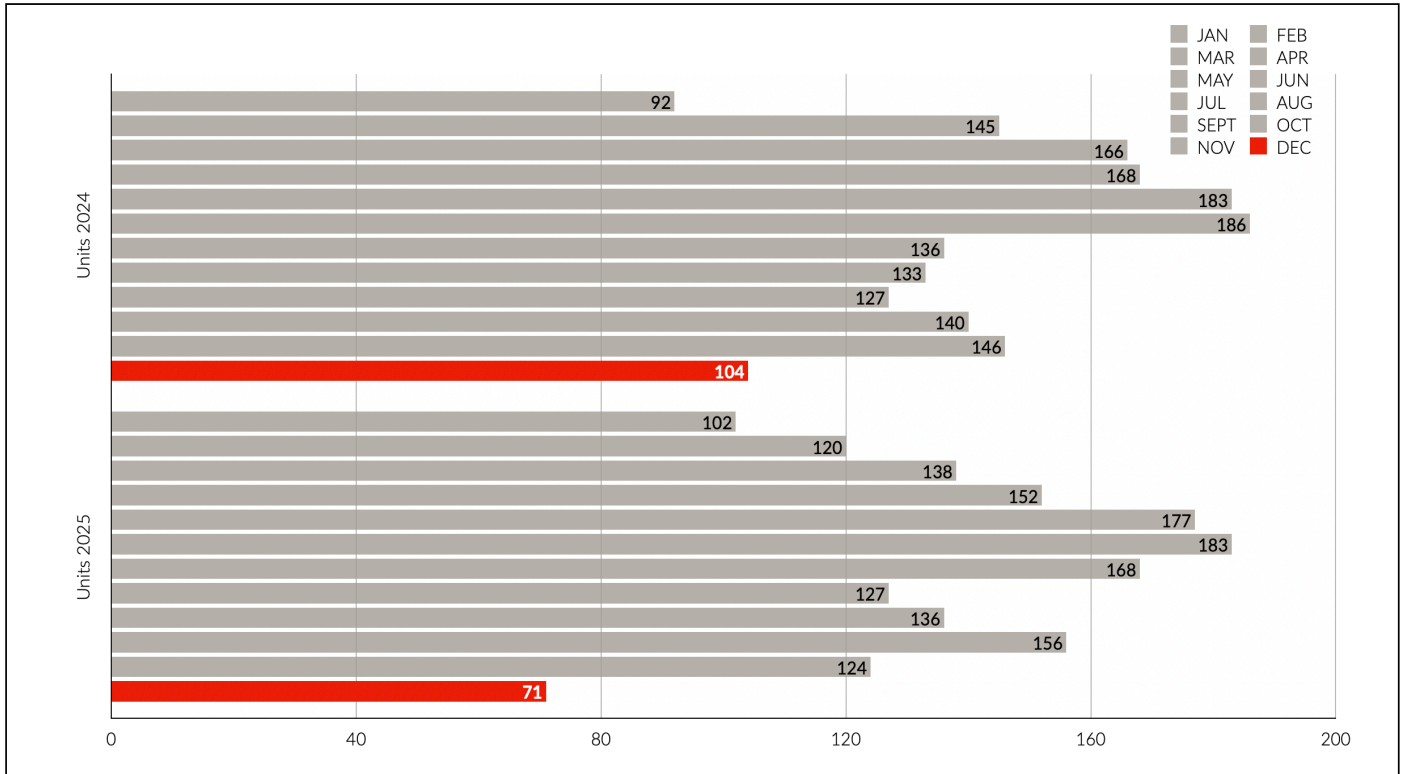


Yearly Totals 2024 vs. 2025

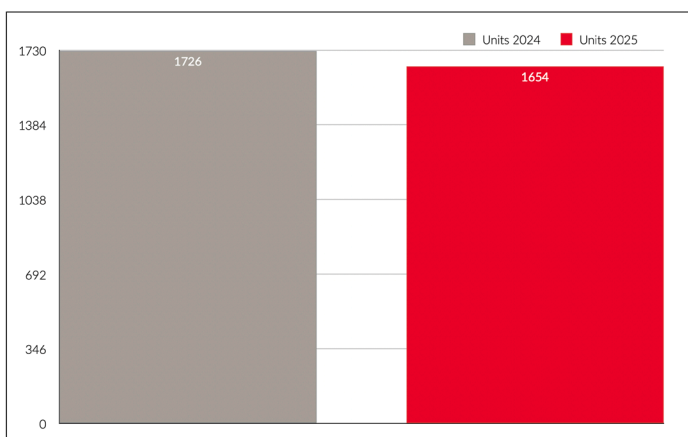


Month vs. Month 2024 vs. 2025

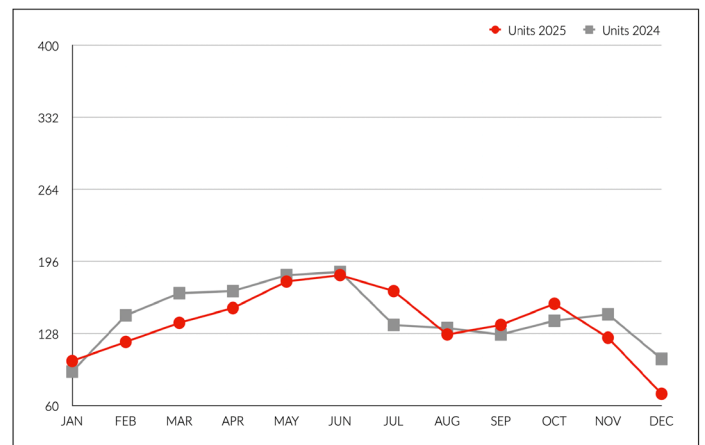
UNIT SALES



Monthly Comparison 2024 vs. 2025



Yearly Totals 2024 vs. 2025



Month vs. Month 2024 vs. 2025

SALES BY TYPE















FREEHOLD



CONDOMINIUM



VACANT LAND

	FREEHOLD	CONDOMINIUM	VACANT LAND
YTD Sales Volume	 \$1,009,994,826 +5.59%	 \$291,043,076 -22.4%	 \$4,905,000 -40.74%
YTD Unit Sales	 1159 +7.51%	 495 -17.91%	 7 0%
YTD Average Sale Price	 \$871,436 -2.24%	 \$587,966 +1.05%	 \$700,714.29 +69.95%
December Sales Volume	 \$38,078,865 -31.55%	 \$13,050,800 -45.84%	 \$0 No Change

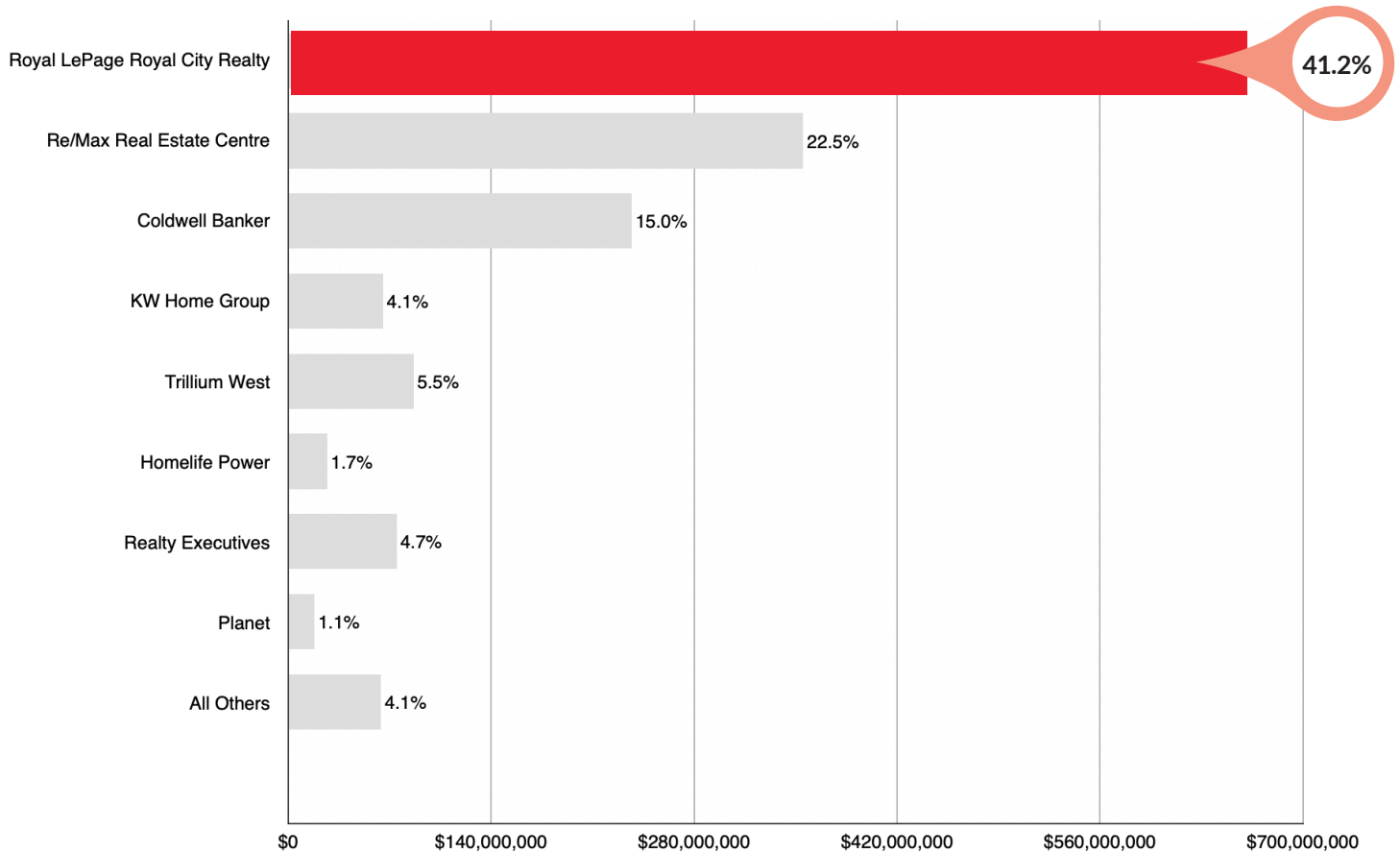


NOTE: All MLS® sales data in this report comes from the One Point Association Of REALTORS® and refers specifically to residential sales as of December 1, 2025.

Year-Over-Year Comparison (2025 vs. 2024)

While deemed to be reliable, Royal LePage Royal City Realty assumes no responsibility for errors and omissions.

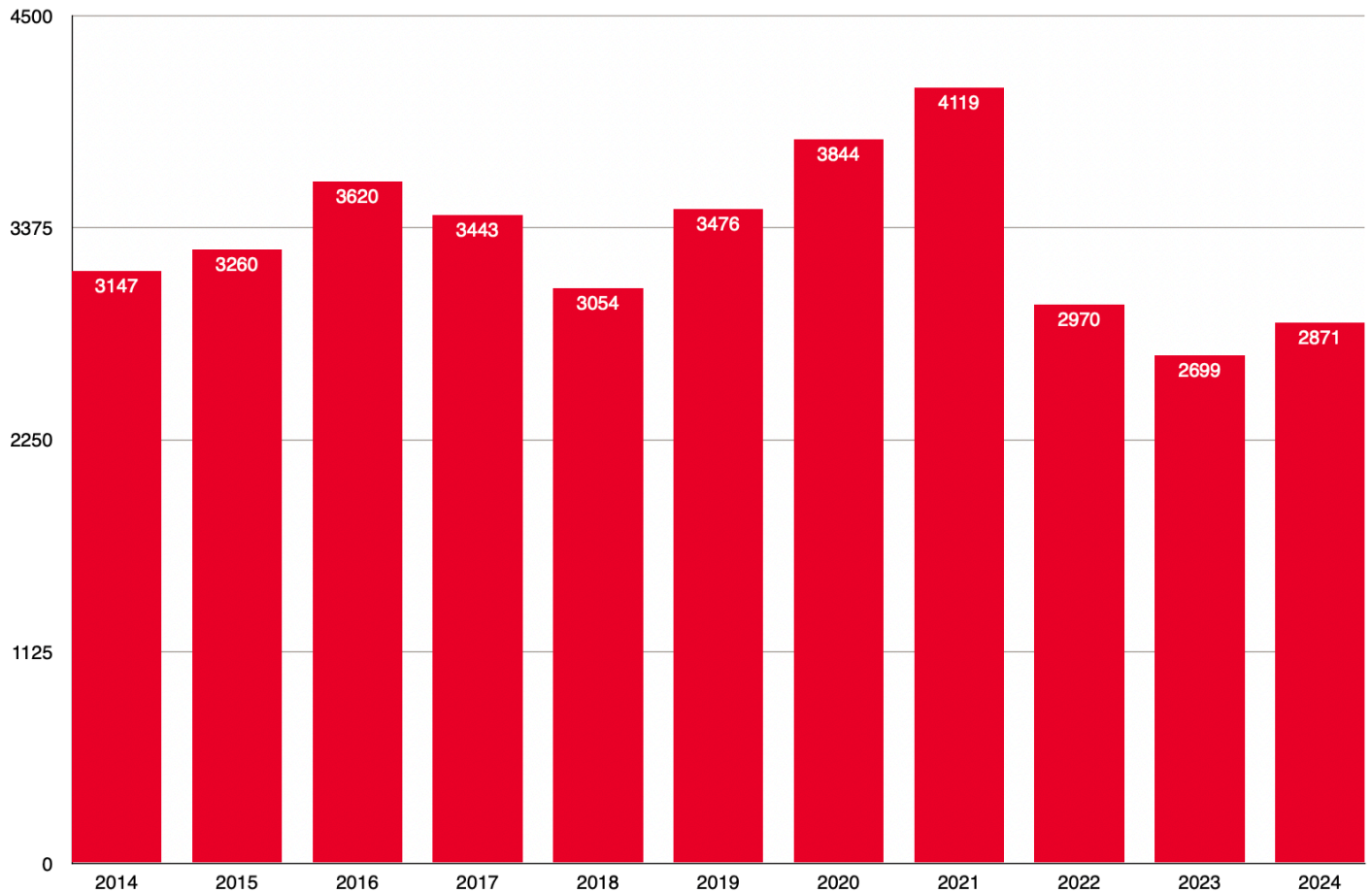
MARKET DOMINANCE



Market Share by Dollar Volume Within Wellington County
Listing Selling Ends Combined for Guelph Based Companies
December 2024



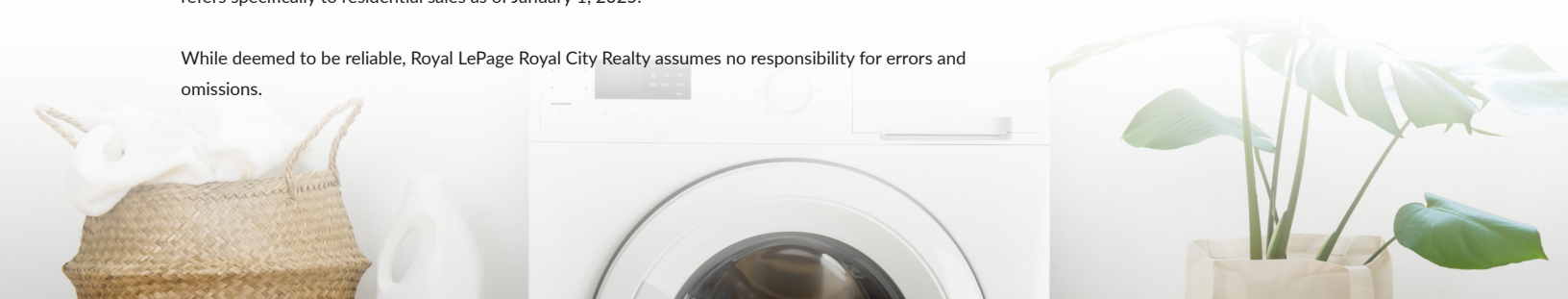
10 YEAR MARKET ANALYSIS



Units Sold

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OUR LOCATIONS



ELORA

519-846-1365
9 Mill Street E., Elora



FERGUS

519-843-1365
162 St. Andrew Street E., Fergus



GUELPH

519-824-9050
30 Edinburgh Road N., Guelph



ROCKWOOD

519-856-9922
118 Main Street S., Rockwood



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