2026 SEPTEMBER

WELLINGTON COUNTY

Real Estate Market Report

ROYAL LEPAGE 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

BUYER'S MARKET

Wellington County remained in buyer's market territory through September, with the year-to-date sales-to-listings ratio sitting at 37.67%, below the 39% threshold. September pricing softened year over year, as the median sale price declined 5.57% to $746,000, while the average sale price decreased 3.52% to $856,034. Sales activity was mixed, with sales volume edging down 0.50% to $225.99M, while unit sales increased 3.13% to 264 transactions. New listings decreased 12.69% to 681, while expired listings rose 30.40% to 163, reflecting continued competition among sellers. Although the monthly sales-to-listings ratio improved to 38.77%, the year-to-date ratio remains below the balanced market threshold, keeping Wellington County in buyer's market territory overall.

September year-over-year sales volume of $225,992,874

Down 0.50% from 2025's $227,134,626 with unit sales of 264 up 3.13% from last September's 256. New listings of 681 are down 12.69% from a year ago, with the sales/listing ratio of 38.77% up from 32.82% last year.

Year-to-date sales volume of $1,845,517,534

Down 2.49% from 2025's $1,892,602,857 with unit sales of 2,210 down 0.50% from 2025's 2,221. New listings of 5,866 are down 1.31% from a year ago, with the sales/listing ratio of 37.67% up from 37.37% last year.

Year-to-date average sale price of $832,295

Down from $850,068 one year ago, with median sale price of $745,000 down from $785,000 one year ago. Average days-on-market of 46 is up approximately 8 days from last year.

SEPTEMBER NUMBERS

Median Sale Price
$746,000
-5.57%

Average Sale Price
$856,034
-3.52%

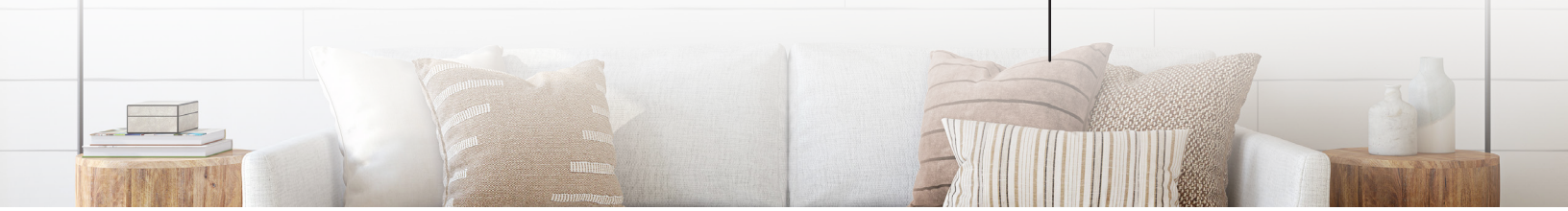
Sales Volume
$225,992,874
-0.5%

Unit Sales
264
+3.13%

New Listings
681
-12.69%

Expired Listings
163
+30.4%

Unit Sales/Listings Ratio
38.77%
+5.95%
Year-over-year comparison (September 2026 vs. September 2025)

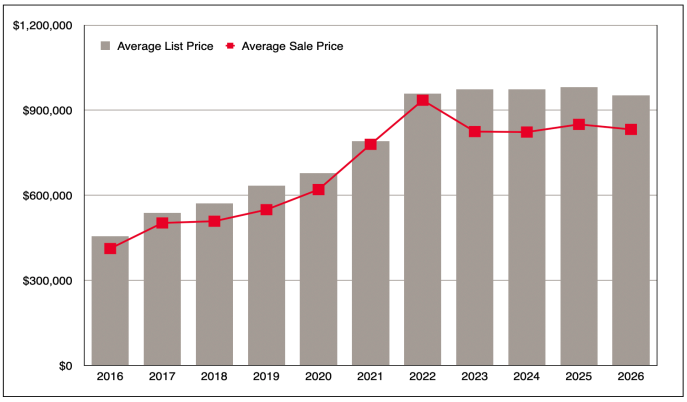


THE MARKET IN DETAIL

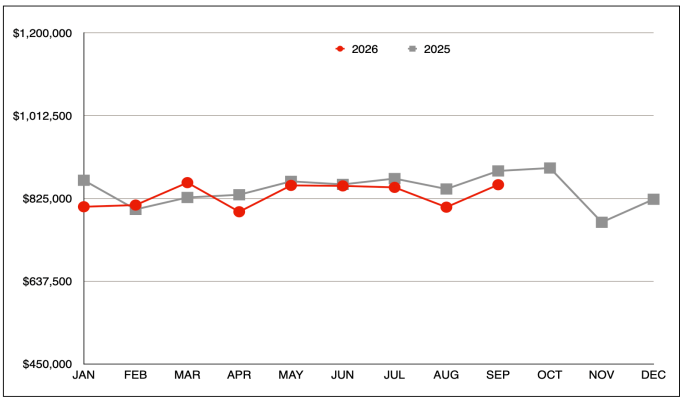
	2024	2025	2026	2025-2026
YTD Volume Sales	$1,848,827,492	$1,892,602,857	$1,845,517,534	-2.49%
YTD Unit Sales	2,241	2,221	2,210	-0.5%
YTD New Listings	4,588	5,944	5,866	-1.31%
YTD Sales/Listings Ratio	48.84%	37.37%	37.67%	+0.83%
YTD Expired Listings	488	720	1,003	+39.31%
Monthly Volume Sales	$193,599,700	$227,134,626	$225,992,874	-0.5%
Monthly Unit Sales	228	256	264	+3.13%
Monthly New Listings	575	780	681	-12.69%
Monthly Sales/Listings Ratio	39.65%	32.82%	38.77%	+18.12%
Monthly Expired Listings	78	125	163	+30.4%
YTD Sales: $0-$199K	25	13	22	+69.23%
YTD Sales: $200k-349K	22	37	43	+16.22%
YTD Sales: $350K-$549K	311	317	380	+19.87%
YTD Sales: $550K-$749K	700	609	668	+9.69%
YTD Sales: $750K-$999K	720	740	603	-18.51%
YTD Sales: $1M-$2M	445	464	401	-13.58%
YTD Sales: $2M+	29	45	55	+22.22%
YTD Average Days-On-Market	33.11	37.89	45.78	+20.82%
YTD Average Sale Price	$822,949	$850,068	$832,295	-2.09%
YTD Median Sale Price	$775,250	$785,000	$745,000	-5.1%

Wellington County MLS Sales and Listing Summary
2024 vs. 2025 vs. 2026

AVERAGE SALE PRICE

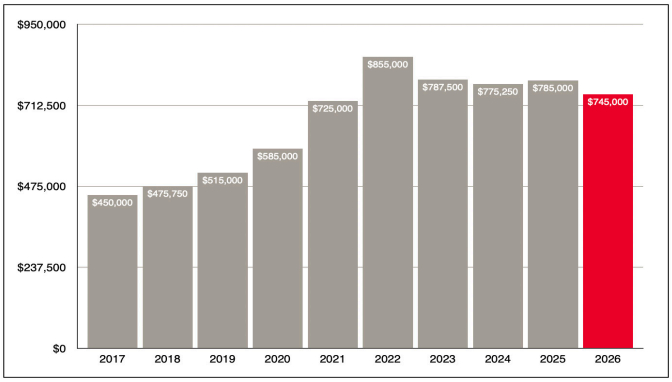


Year-Over-Year

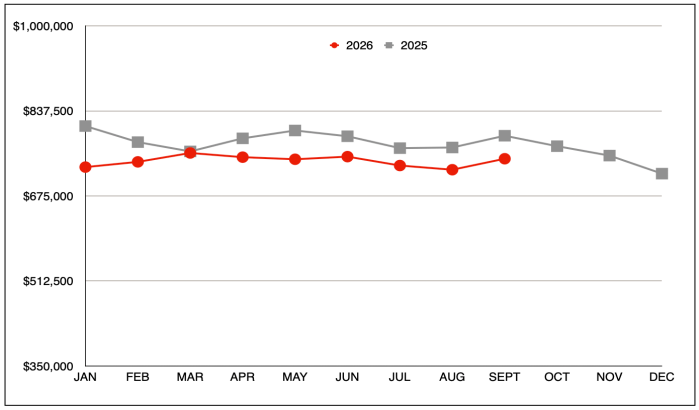


Month-Over-Month 2025 vs. 2026

MEDIAN SALE PRICE



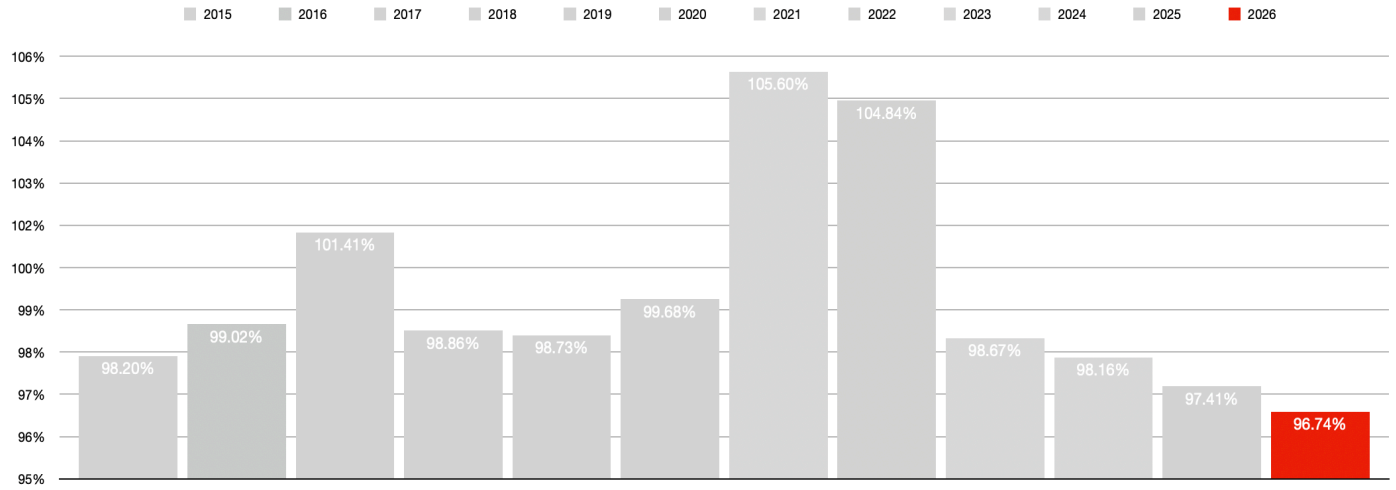
Year-Over-Year



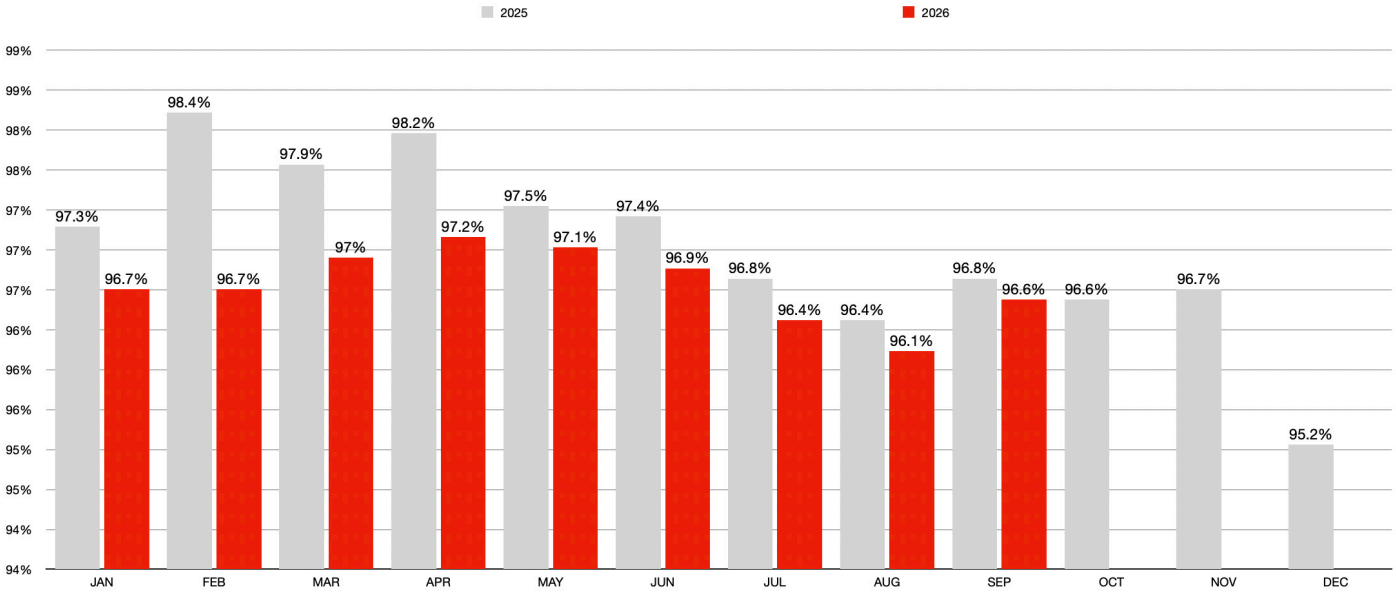
Month-Over-Month 2025 vs. 2026

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

SALE PRICE VS. LIST PRICE RATIO

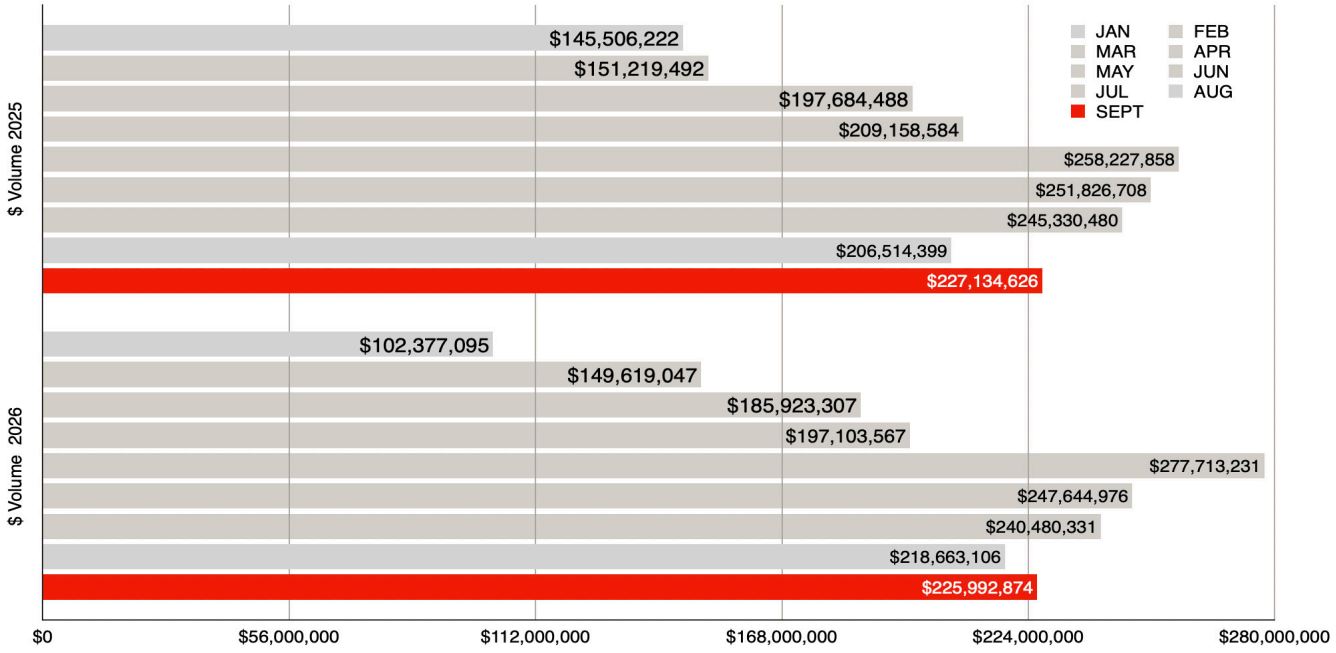


Year-Over-Year

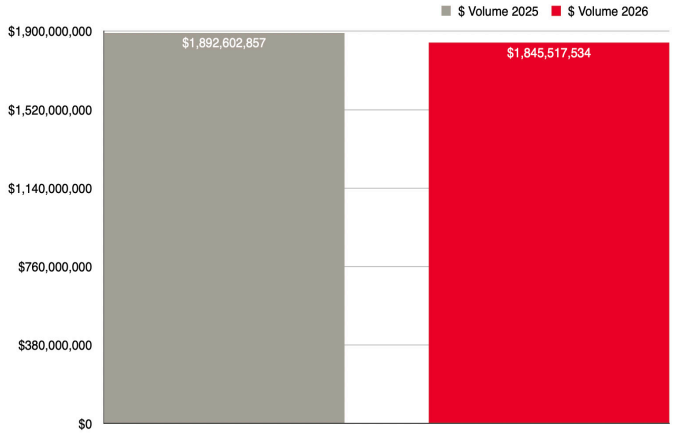


Month-Over-Month 2025 vs. 2026

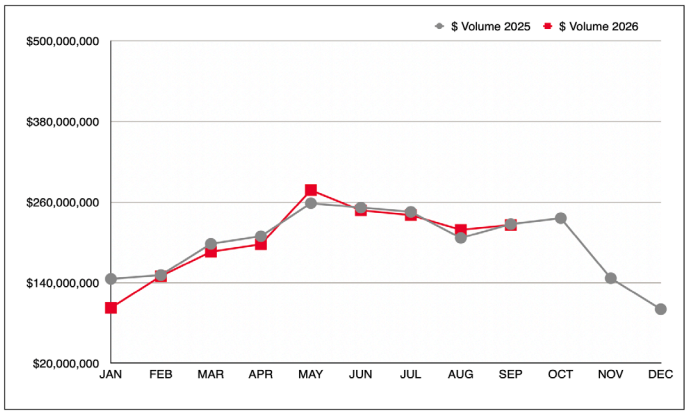
DOLLAR VOLUME SALES



Monthly Comparison 2025 vs. 2026

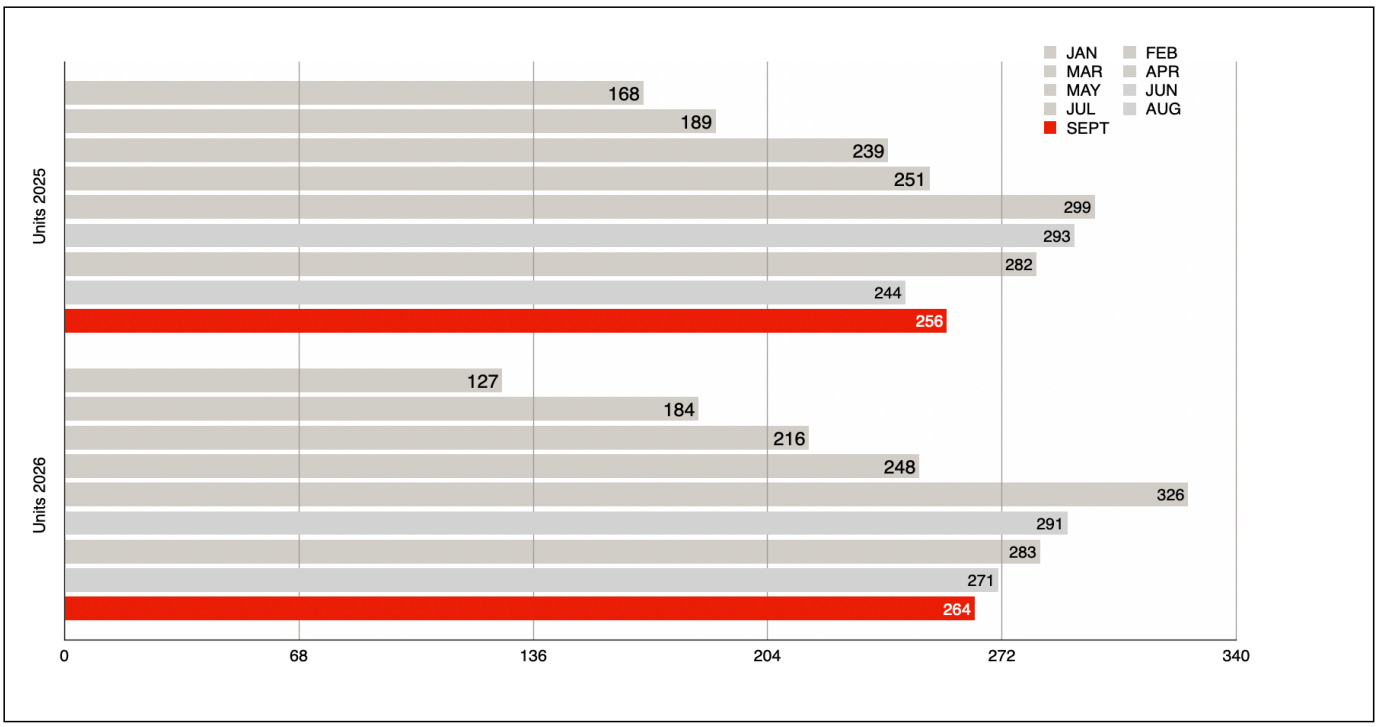


Yearly Totals 2025 vs. 2026

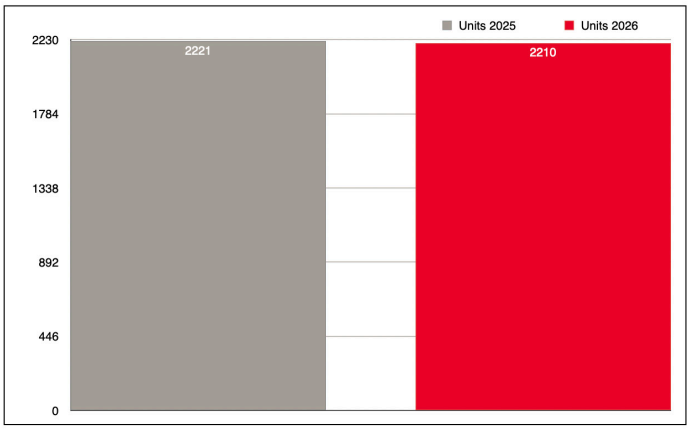


Month vs. Month 2025 vs. 2026

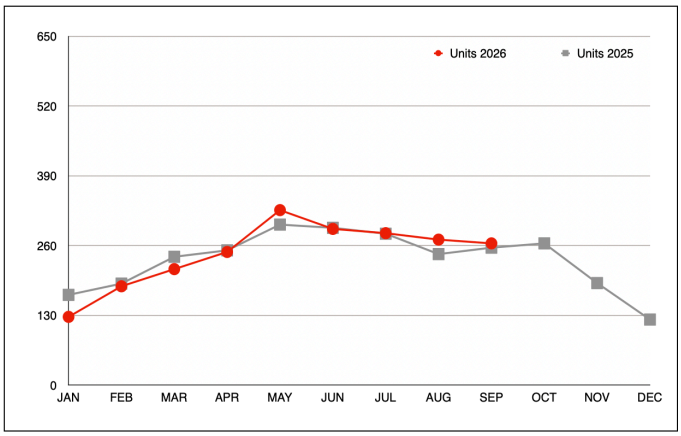
UNIT SALES



Monthly Comparison 2025 vs. 2026



Yearly Totals 2025 vs. 2026



Month vs. Month 2025 vs. 2026

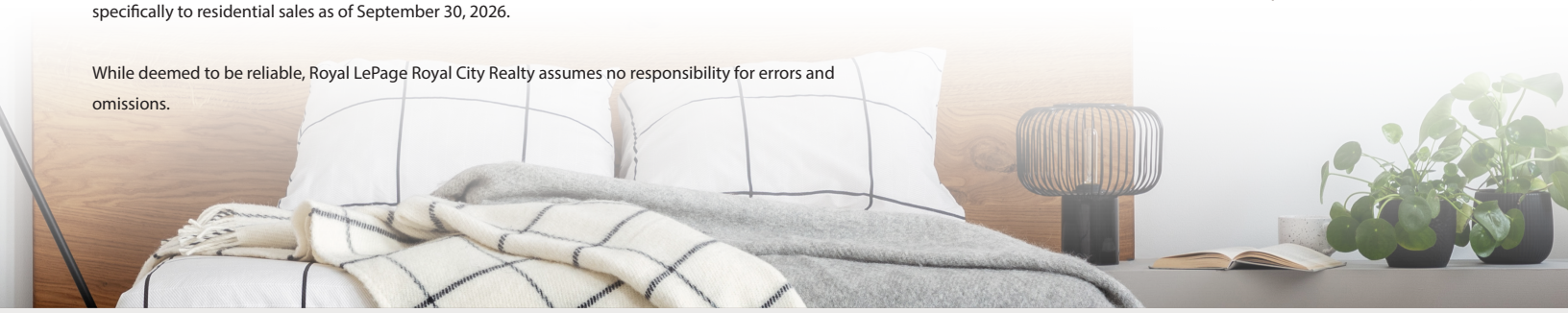
SALES BY TYPE

	FREEHOLD	CONDOMINIUM	VACANT LAND
YTD Sales Volume	$1,578,990,871 -1.17%	$264,171,063 -10.16%	$21,293,955 +0.28%
YTD Unit Sales	1747 +0.87%	458 -6.34%	30 +20%
YTD Average Sale Price	$903,830 -2.02%	$576,793 -4.08%	$709,798.50 -16.43%
September Sales Volume	$199,870,531 -1.39%	$26,122,343 +6.89%	$2,492,500 -40.43%
September Unit Sales	217 No Change	47 +20.51%	6 +50%

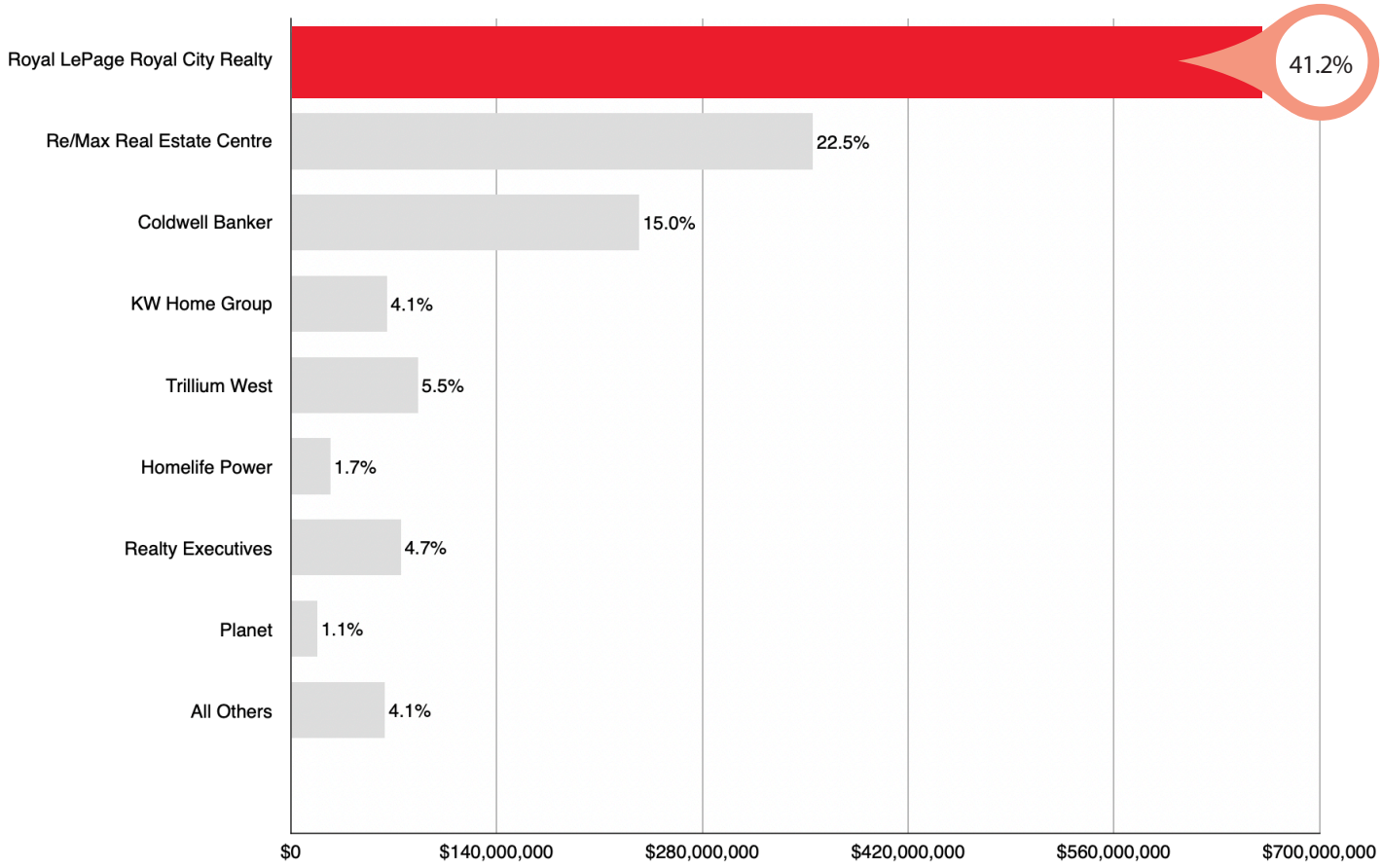
Year-Over-Year Comparison (2025 vs. 2026)

NOTE: All MLS® sales data in this report comes from the One Point Association Of REALTORS® and refers specifically to residential sales as of September 30, 2026.

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

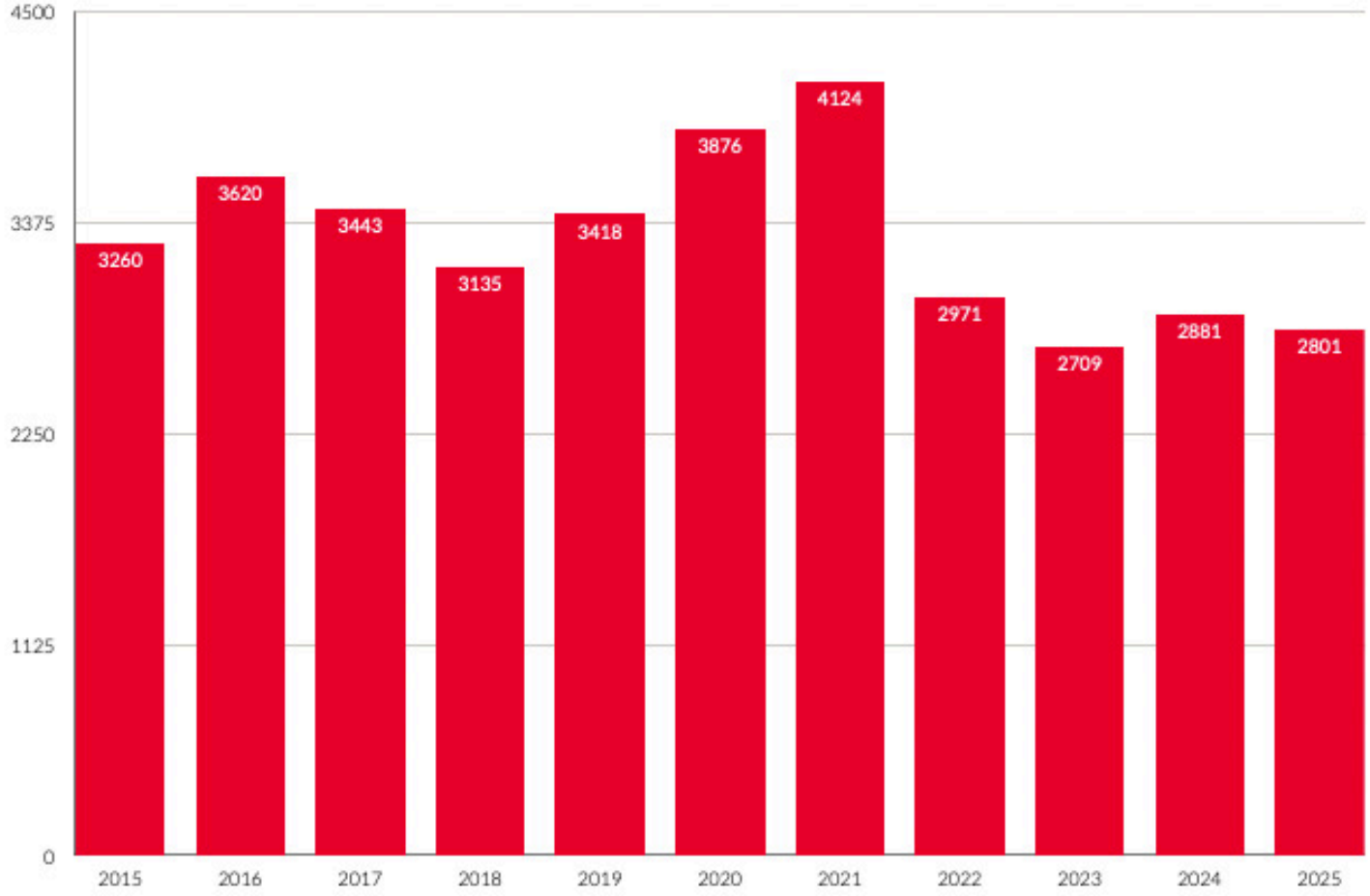


MARKET DOMINANCE



Market Share by Dollar Volume Within Wellington County
Listing Selling Ends Combined for Guelph Based Companies
September 2025

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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