



2025

DECEMBER

WELLINGTON COUNTY

Real Estate Market Report



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

The **Wellington County's** real estate market continued to favour buyers this period, as declining sales activity and rising inventory increased negotiating power. The median sale price dropped 7.89% to \$717,500, while the average sale price decreased 2.5% to \$823,066. Sales volume fell sharply by 27.02% to \$100.41M, driven by a 25.15% decline in unit sales to 122 transactions. New listings edged up 2.65% to 194, while expired listings surged 73.91% to 200, further expanding buyer choice and adding pressure on sellers. With the unit sales-to-listings ratio at 62.89%, down 23.36% year over year, market conditions remain firmly buyer-friendly across the county.



December year-over-year sales volume of \$100,414,040

Down -27.02% from 2024's \$137,597,700 with unit sales of 122 down -25.15% from last December's 163. New listings of 194 are up +2.65% from a year ago, with the sales/listing ratio of 62.89% down -23.36%.



Year-to-date sales volume of \$2,375,479,646

Down -0.33% from 2024's \$2,383,398,979 with unit sales of 2797 down -2.58% from 2024's 2871. New listings of 7,179 are up +28.49% from a year ago, with the sales/listing ratio of 38.96% down -12.43%.



Year-to-date average sale price of \$844,874

Up from \$829,208 one year ago with median sale price of \$773,889 down from \$775,875 one year ago. Average days-on-market of 40 is up 6 days from last year.

DECEMBER NUMBERS

Median Sale Price

\$717,500

-7.89%

Average Sale Price

\$823,066

-2.5%

Sales Volume

\$100,414,040

-27.02%

Unit Sales

122

-25.15%

New Listings

194

+2.65%

Expired Listings

200

+73.91%

Unit Sales/Listings Ratio

62.89%

-23.36%

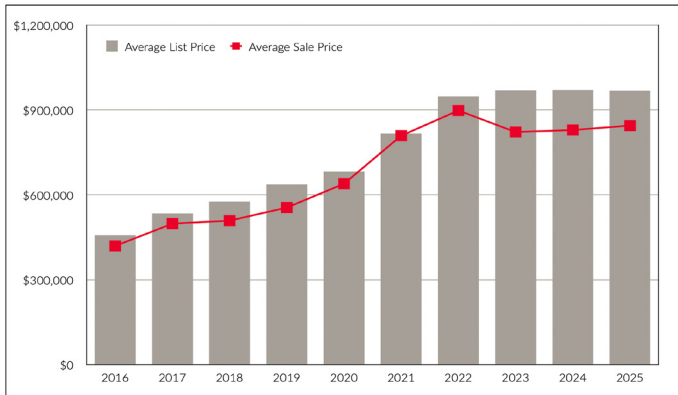
*Year-over-year comparison
(December 2025 vs. December 2024)*

THE MARKET IN DETAIL

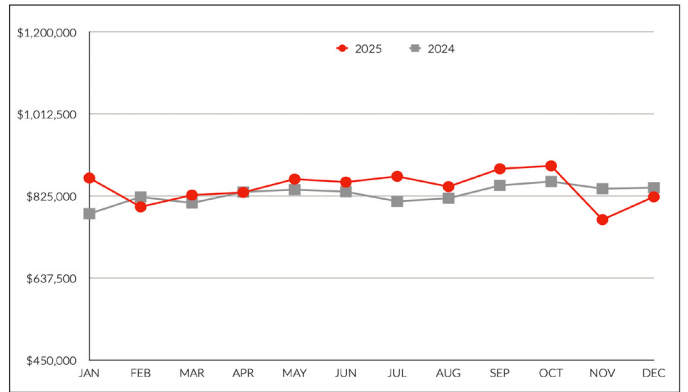
| | 2023 | 2024 | 2025 | 2024-2025 |
|-------------------------------------|-----------------|-----------------|-----------------|-----------|
| YTD Volume Sales | \$2,238,154,165 | \$2,383,398,979 | \$2,375,479,646 | -0.33% |
| YTD Unit Sales | 2,699 | 2,871 | 2,797 | -2.58% |
| YTD New Listings | 4,844 | 5,587 | 7,179 | +28.49% |
| YTD Sales/Listings Ratio | 55.72% | 51.39% | 38.96% | -12.43% |
| YTD Expired Listings | 548 | 747 | 1,165 | +55.96% |
| Monthly Volume Sales | \$79,196,971 | \$137,597,700 | \$100,414,040 | -27.02% |
| Monthly Unit Sales | 102 | 163 | 122 | -25.15% |
| Monthly New Listings | 121 | 189 | 194 | +2.65% |
| Monthly Sales/Listings Ratio | 84.30% | 86.24% | 62.89% | -23.36% |
| Monthly Expired Listings | 116 | 115 | 200 | +73.91% |
| YTD Sales: \$0-\$199K | 0 | 0 | 0 | No Change |
| YTD Sales: \$200k-349K | 29 | 29 | 46 | +58.62% |
| YTD Sales: \$350K-\$549K | 390 | 403 | 415 | +2.98% |
| YTD Sales: \$550K-\$749K | 785 | 877 | 787 | -10.26% |
| YTD Sales: \$750K-\$999K | 904 | 946 | 922 | -2.54% |
| YTD Sales: \$1M-\$2M | 525 | 553 | 557 | +0.72% |
| YTD Sales: \$2M+ | 40 | 45 | 60 | +33.33% |
| YTD Average Days-On-Market | 29.33 | 34.25 | 40.25 | +17.52% |
| YTD Average Sale Price | \$822,086 | \$829,208 | \$844,874 | +1.89% |
| YTD Median Sale Price | \$771,250 | \$775,875 | \$773,889 | -0.26% |

Wellington County MLS Sales and Listing Summary
2023 vs. 2024 vs. 2025

AVERAGE SALE PRICE

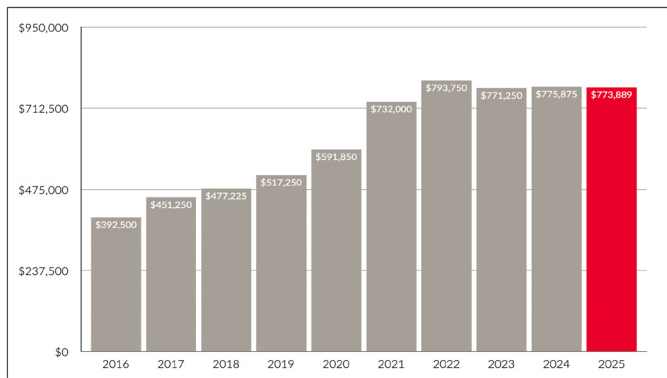


Year-Over-Year

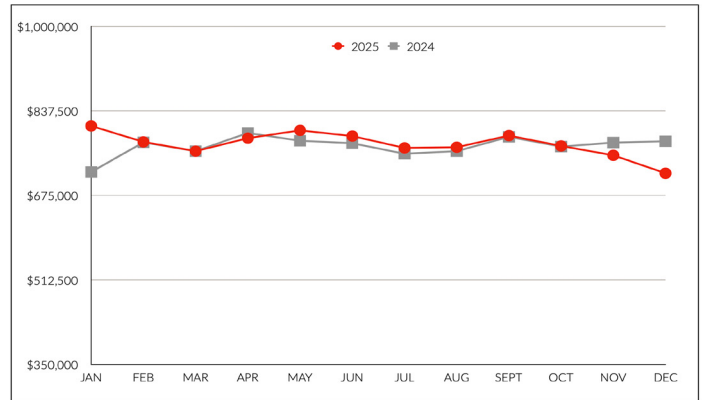


Month-Over-Month 2024 vs. 2025

MEDIAN SALE PRICE



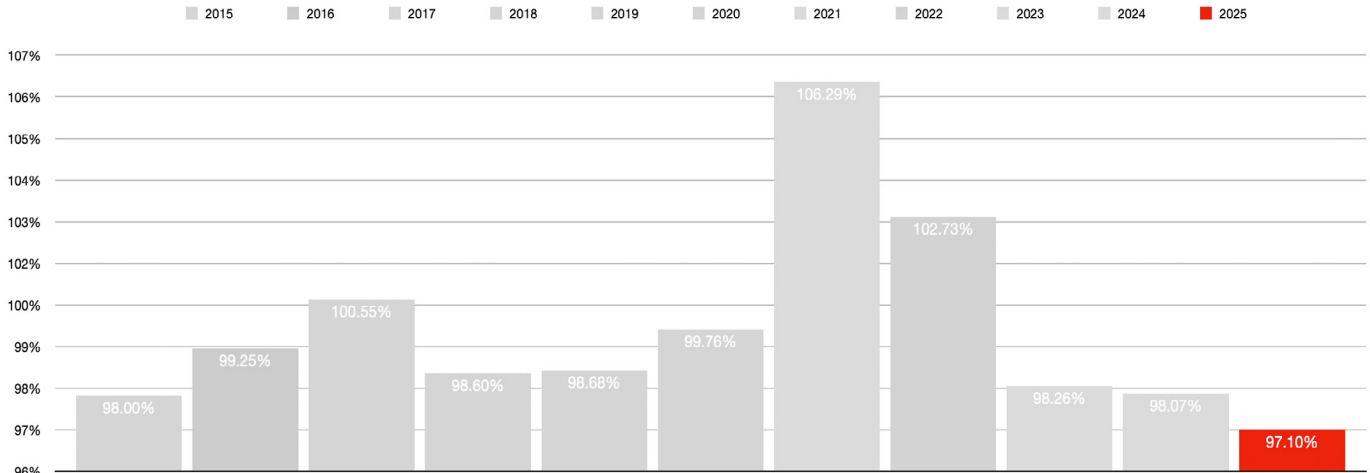
Year-Over-Year



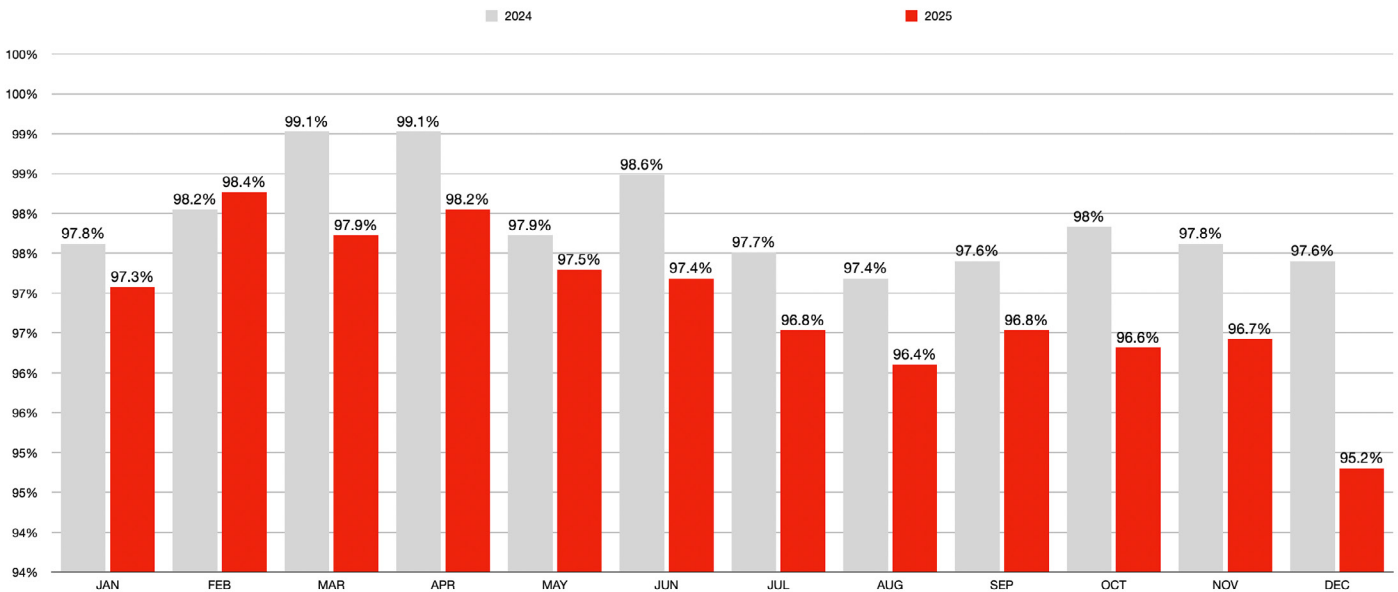
Month-Over-Month 2024 vs. 2025

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

SALE PRICE VS. LIST PRICE RATIO

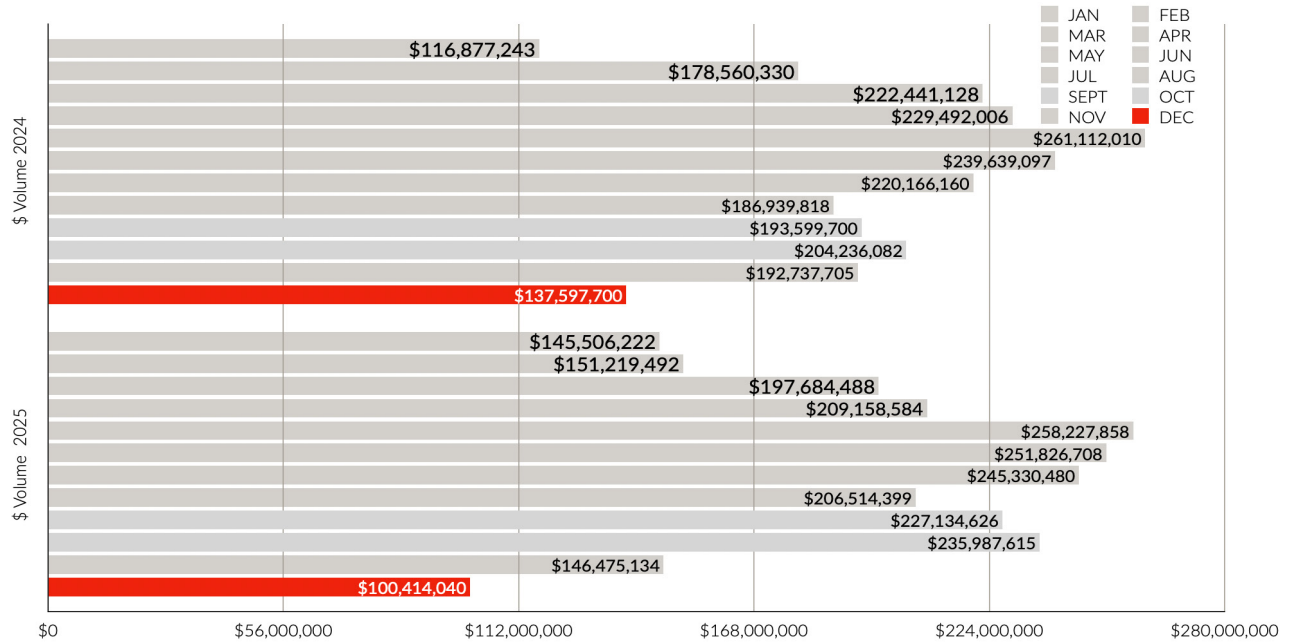


Year-Over-Year

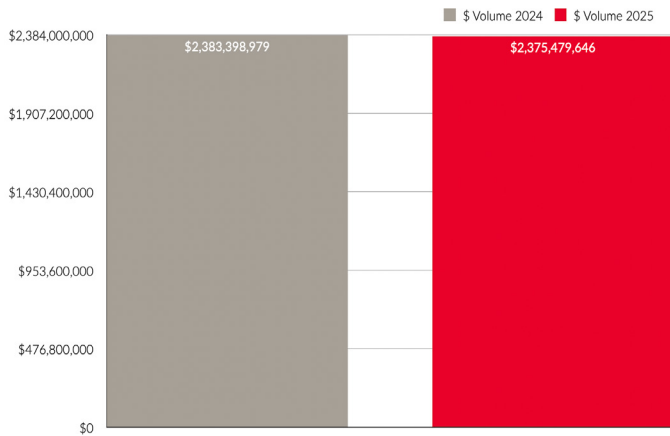


Month-Over-Month 2024 vs. 2025

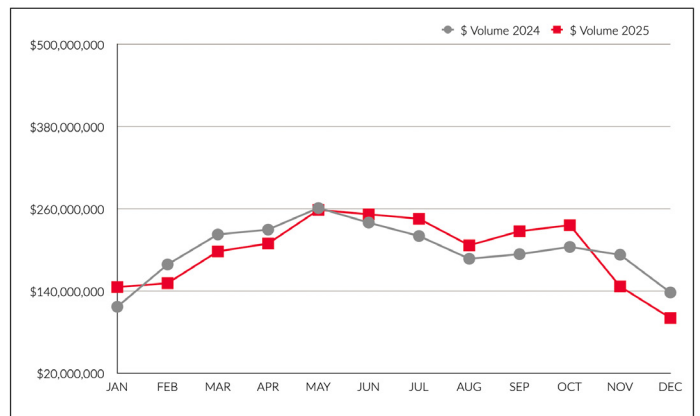
DOLLAR VOLUME SALES



Monthly Comparison 2024 vs. 2025

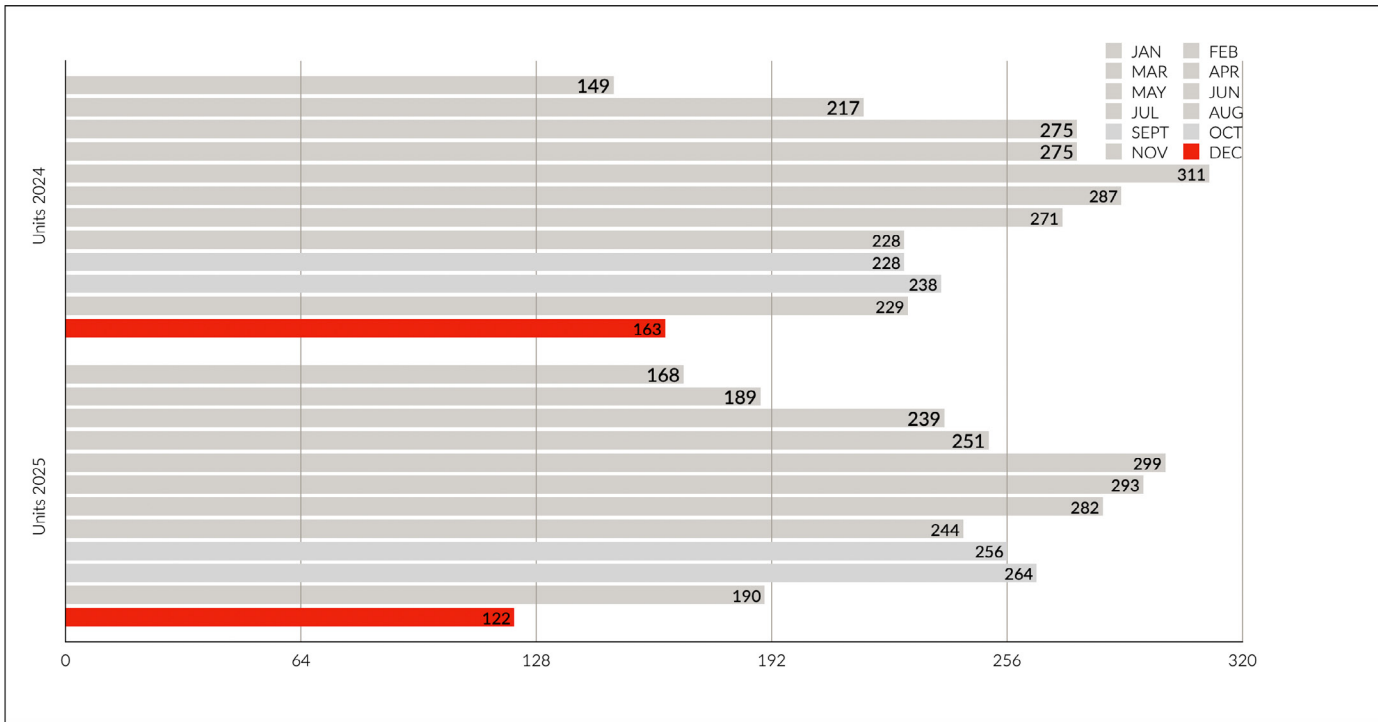


Yearly Totals 2024 vs. 2025

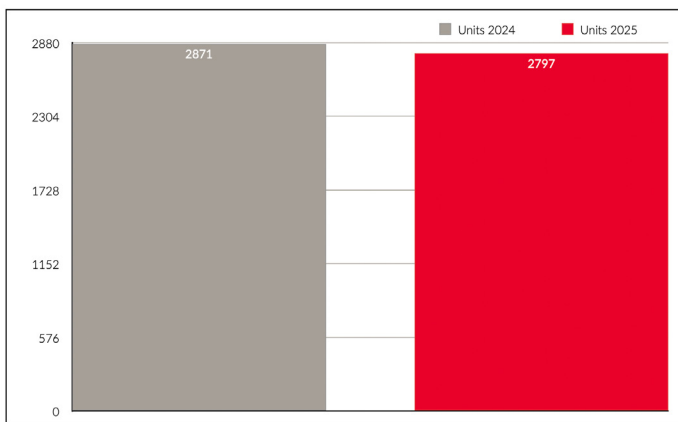


Month vs. Month 2024 vs. 2025

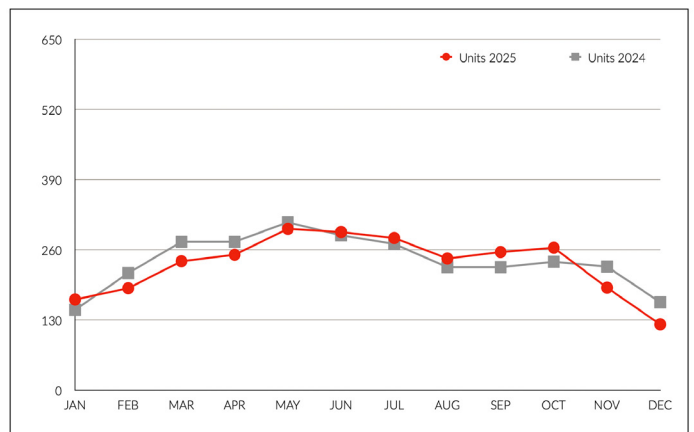
UNIT SALES



Monthly Comparison 2024 vs. 2025



Yearly Totals 2024 vs. 2025



Month vs. Month 2024 vs. 2025

SALES BY TYPE

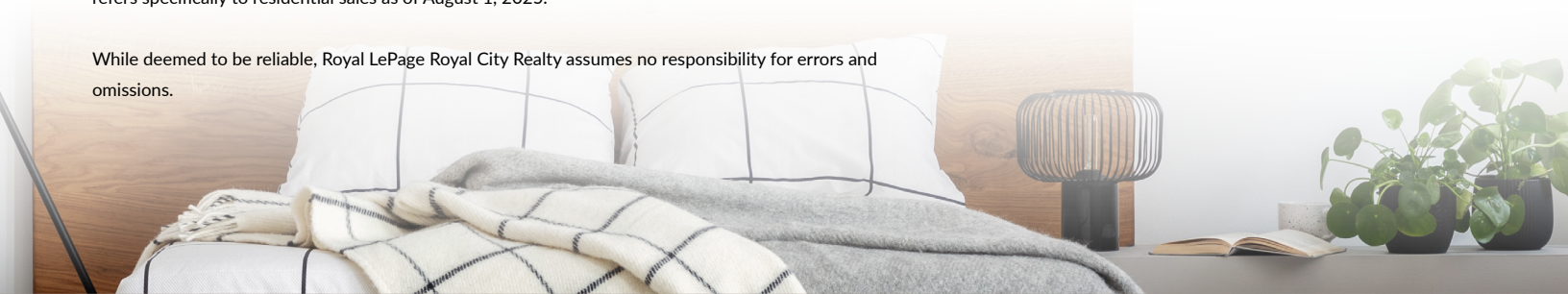


| | FREEHOLD | CONDOMINIUM | VACANT LAND |
|------------------------|--------------------------------------|-------------------------------------|------------------------------------|
| YTD Sales Volume | \$2,019,923,290 +7.28% | \$355,556,356 -17.39% | \$28,389,000 -32.7% |
| YTD Unit Sales | 2202 +7.41% | 596 -14.12% | 32 -25.58% |
| YTD Average Sale Price | \$917,313 -0.45% | \$596,571 +1.09% | \$887,156.25 +52.11% |
| December Sales Volume | \$84,873,240 -23.74% | \$15,540,800 -40.93% | \$0 -100% |
| December Unit Sales | 93 -21.19% | 29 -35.56% | 0 -100% |

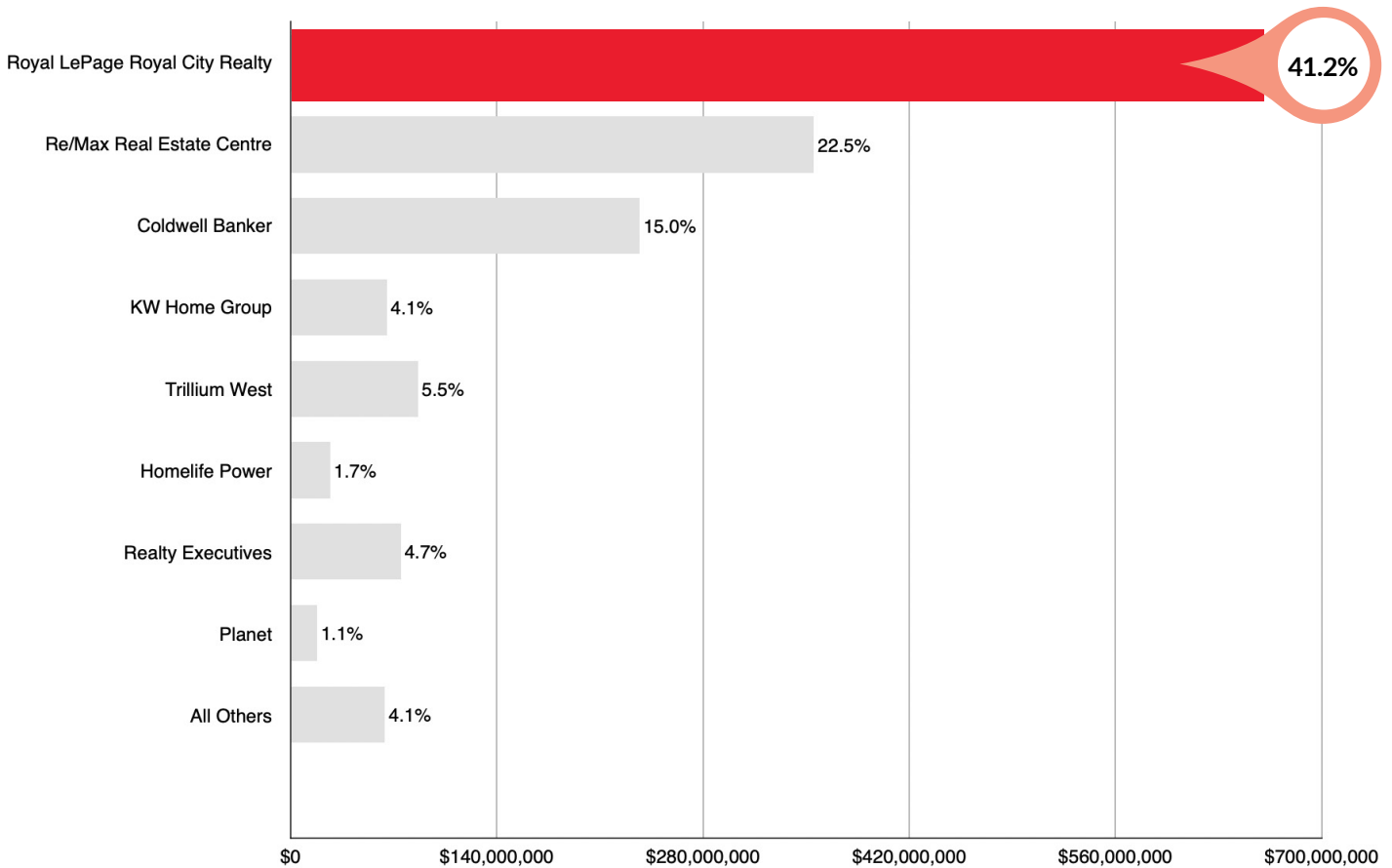
NOTE: All MLS® sales data in this report comes from the One Point Association Of REALTORS® and refers specifically to residential sales as of August 1, 2025.

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

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



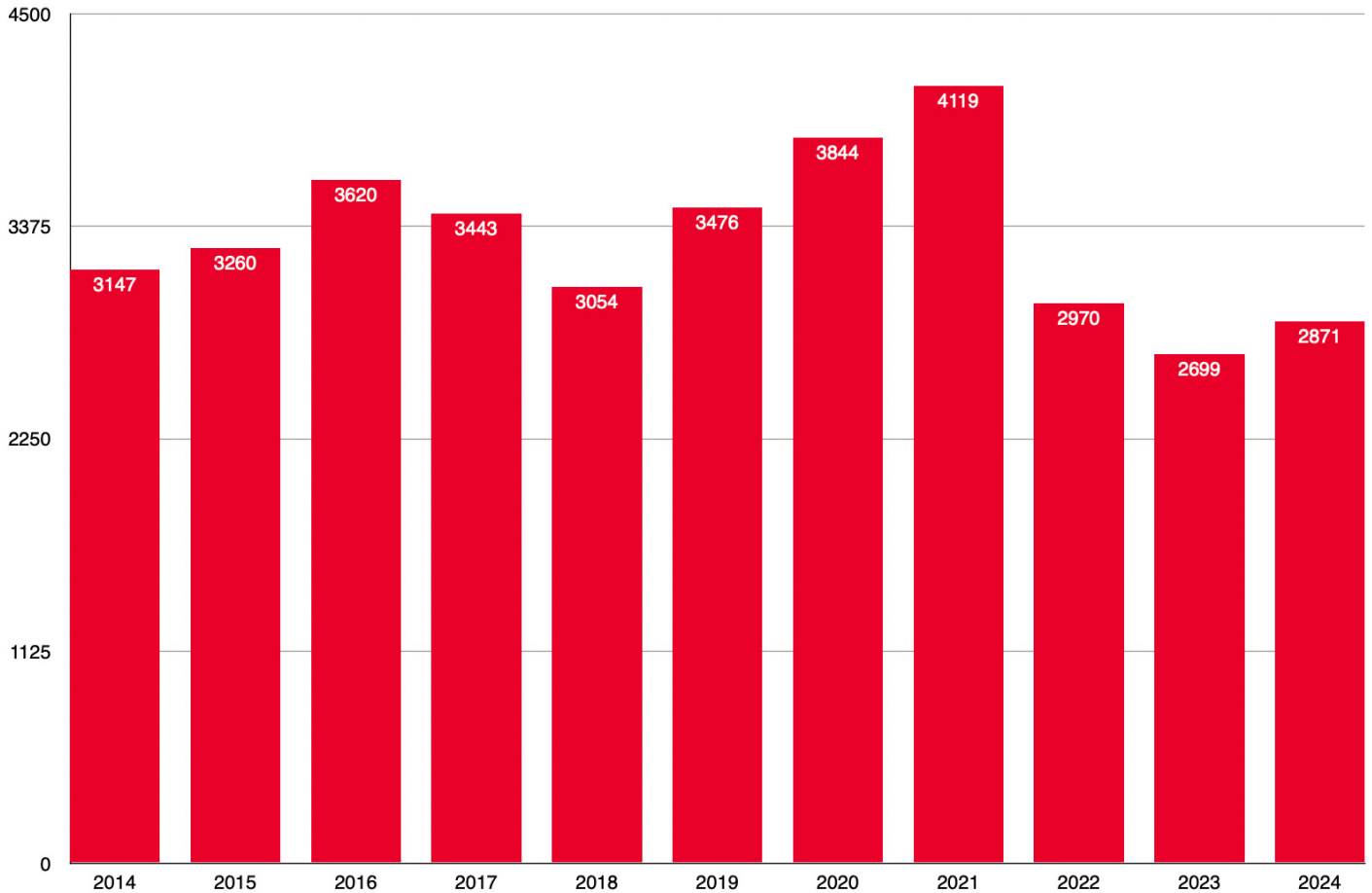
MARKET DOMINANCE



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



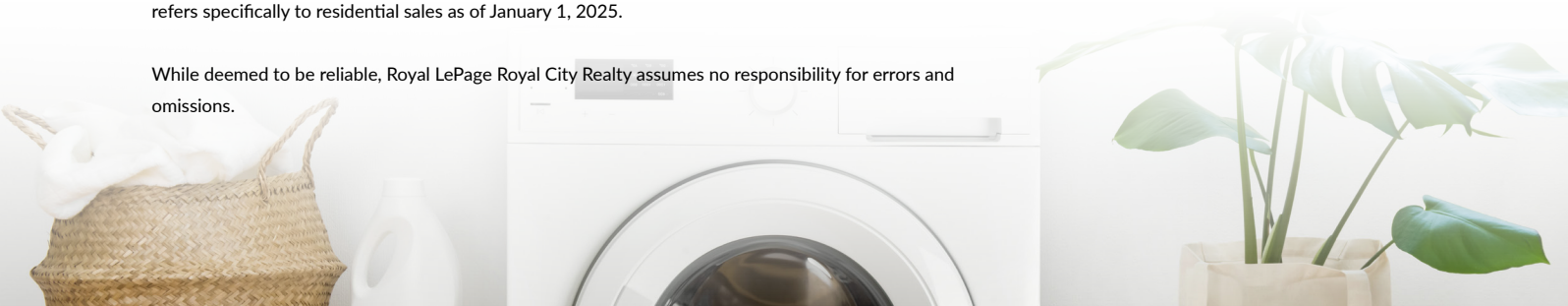
10 YEAR MARKET ANALYSIS



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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