



MARIN COUNTY MARKET UPDATE

Q1 2026





VANGUARD PROPERTIES

MARKET UPDATE

MARIN COUNTY | Q1 2026

Marin County's housing market saw a notable pickup in activity in Q1 2026, with buyer engagement increasing meaningfully compared to the same time last year. The number of homes sold rose 5.4% to 333 for single-family homes and jumped 16.9% to 76 for condominiums, while pending sales increased 7.4% and 11.4% respectively. This acceleration in transaction volume signals that buyers are re-engaging as we head into the spring market.

Inventory trends were mixed. Single-family home inventory increased 32.6% year-over-year to 232 homes, offering more options for buyers, while condominium inventory remained essentially flat, down just 1.2%. Despite this increase in supply on the single-family side, overall inventory remains relatively constrained, continuing to support a competitive environment for well-priced homes.

Pricing performance diverged by property type. The median sales price for single-family homes held steady at \$1,700,000, with price per square foot rising 1.6%, reflecting continued stability at the higher end of the market. In contrast, condominium pricing adjusted, with the median price declining 19.6% to \$611,250 and price per square foot down 17.8%. These shifts appear to be improving affordability and helping drive the rebound in condo sales activity.

Homes are still moving relatively quickly. Median days on market increased modestly to 20 days for single-family homes and 33 days for condominiums, indicating a more balanced pace compared to prior years, while still reflecting healthy underlying demand.

Looking ahead, Marin County is well positioned for an active spring season. Mortgage rates have moved higher from recent lows, rising from just under 6% in late February to the mid-6% range after five consecutive weekly increases, before easing slightly in the latest reading. Despite this volatility, rates remain below year-ago levels, and buyers have largely adapted to the current environment. Combined with strong equity markets and improving confidence, demand continues to build as we move into the spring market, setting up for increased competition for well-priced homes.



SINGLE FAMILY HOMES



CONDOMINIUMS

Q1 2026

Median Sales Price	\$1,700,000
Days on market	20 ↑
\$ / SQ. FT.	\$837 ↑
# For Sale On Last Day Of Quarter	232 ↑
Went Into Contract	377 ↑
Properties Sold	333 ↑

Q1 2026

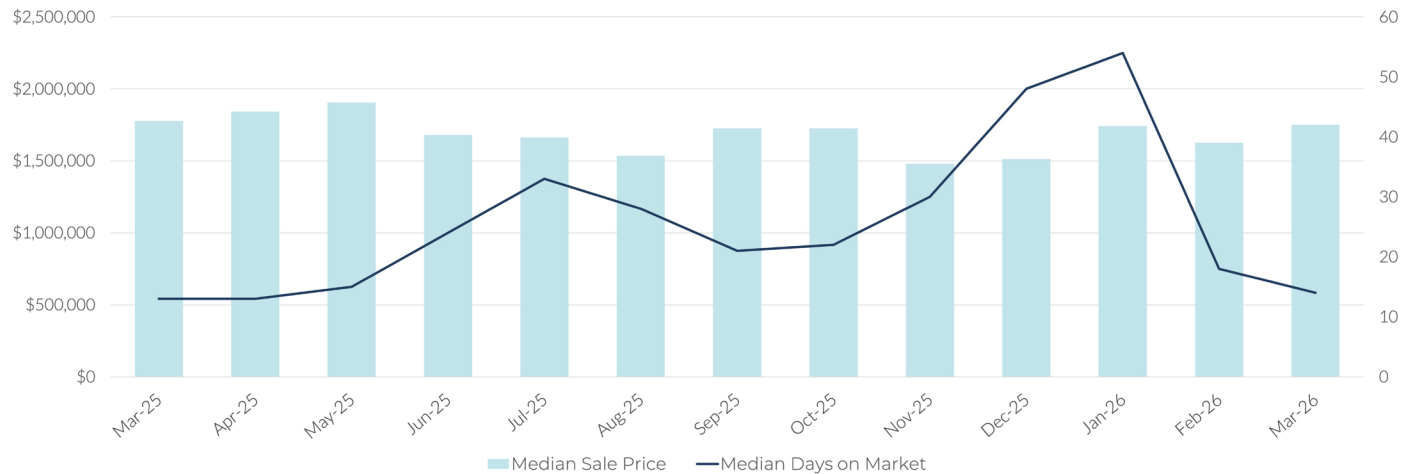
Median Sales Price	\$611,250 ↓
Days On Market	33 ↑
\$ / Sq. Ft.	\$542 ↓
# For Sale Last Day Of Quarter	85 ↓
Went Into Contract	78 ↑
Properties Sold	76 ↑

MARIN COUNTY MARKET UPDATE

Q1 2026

SINGLE FAMILY RESIDENCES

MONTH-OVER-MONTH COMPARISON



CHANGE IN PAST MONTH:

SALES PRICE: **+7.7%**

DAYS ON MARKET: **-4 days**

YEAR-OVER-YEAR COMPARISON

"The median sales price for single-family homes held steady at \$1,700,000, with price per square foot rising 1.6%, reflecting continued stability at the higher end of the market."

	Q1-2026	Q1-2025	%Δ
Median Sales Price	\$1,700,000	\$1,700,000	0.0%
Median Days On Market	20	16	+25.0%
Median \$ / SQ. FT.	\$837	\$824	+1.6%

	Q1-2026	Q1-2025	%Δ
Total Went Into Contract	377	351	+7.4%
Total Properties Sold	333	316	+5.4%
Total # For Sale Last Day of Quarter	232	175	+32.6%
Total % Of Properties Sold Over List	41.4%	43.4%	-4.6%
Total % Of List Price Received (Average)	100.8%	101.3%	-0.5%

Sources: SFAR Super Regional MLS & BrokerMetrics; Property types covered: Single-family. Only property data posted on the MLS is covered. All information is deemed reliable, but not guaranteed for accuracy. All data is subject to errors, omissions, revisions, and is not warranted. ©2026 Vanguard Properties. All rights reserved. Equal Housing Opportunity, DRE No. 01486075

MARIN COUNTY MARKET UPDATE

Q1 2026

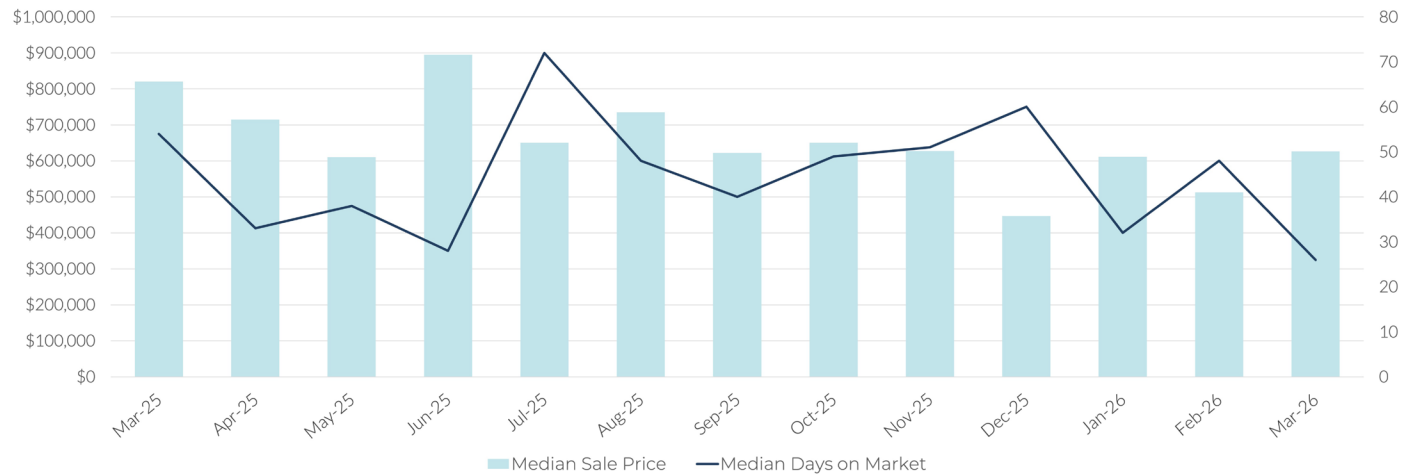
SINGLE FAMILY RESIDENCES

REGION	HOMES SOLD (TOTAL)			DAYS ON MARKET (MEDIAN)			SALE PRICE (MEDIAN)		
	Q1-2026	Q1-2025	%Δ	Q1-2026	Q1-2025	%Δ	Q1-2026	Q1-2025	%Δ
Belvedere	6*	7*	▼ 14%	0	11	▼ 100%	\$6,641,250	\$6,007,000	▲ 11%
Corte Madera	13*	8*	▲ 63%	7	18	▼ 61%	\$2,100,000	\$1,742,500	▲ 21%
Fairfax	10*	18*	▼ 44%	20	25	▼ 20%	\$1,415,000	\$1,220,000	▲ 16%
Greenbrae	7*	5*	▲ 40%	8	9	▼ 11%	\$2,200,000	\$2,600,000	▼ 15%
Kentfield	6*	7*	▼ 14%	11	11	0%	\$3,212,500	\$2,650,000	▲ 21%
Larkspur	6*	10*	▼ 40%	9	9	0%	\$2,559,000	\$2,350,000	▲ 9%
Mill Valley	46*	56	▼ 18%	11	14	▼ 21%	\$2,450,000	\$2,150,000	▲ 14%
Novato	70	76	▼ 8%	20	19	▲ 5%	\$1,350,000	\$1,303,000	▲ 4%
Ross	4*	4*	0%	20	11	▲ 82%	\$3,225,000	\$2,912,500	▲ 11%
San Anselmo	23*	23*	0%	40	12	▲ 233%	\$1,900,000	\$2,000,000	▼ 5%
San Rafael	97	59	▲ 64%	27	17	▲ 59%	\$1,400,000	\$1,525,000	▼ 8%
Sausalito	7*	15*	▼ 53%	20	23	▼ 13%	\$2,340,000	\$1,850,000	▲ 26%
Stinson Beach	5*	1*	▲ 400%	104	265	▼ 61%	\$4,000,000	\$5,850,000	▼ 32%
Tiburon	22*	10*	▲ 120%	14	11	▲ 27%	\$3,510,000	\$4,087,000	▼ 14%
MARIN COUNTY	333	316	▲ 5%	20	16	▲ 25%	\$1,700,000	\$1,700,000	0%

* Denotes small sample size; Use caution when interpreting results. Sources: SFAR Super Regional MLS & BrokerMetrics. Property types covered: Single-family. Only property data posted on the MLS is covered. All information is deemed reliable, but not guaranteed for accuracy. All data is subject to errors, omissions, revisions, and is not warranted. ©2026 Vanguard Properties. All rights reserved. Equal Housing Opportunity. DRE No. 01486075

CONDOMINIUMS

MONTH-OVER-MONTH COMPARISON



CHANGE IN PAST MONTH:

SALES PRICE: **++22.0%**

DAYS ON MARKET: **-22 days**

YEAR-OVER-YEAR COMPARISON

"...condominium pricing adjusted, with the median price declining 19.6% to \$611,250 and price per square foot down 17.8%. These shifts appear to be improving affordability and helping drive the rebound in condo sales activity."

	MEDIAN		
	Q1-2026	Q1-2025	%Δ
Sales Price	\$611,250	\$760,000	-19.6%
Days On Market	33	31	+6.5%
\$ / SQ. FT.	\$542	\$659	-17.8%

	TOTAL		
	Q1-2026	Q1-2025	%Δ
Went Into Contract	78	70	+11.4%
Properties Sold	76	65	+16.9%
# For Sale Last Day of Quarter	85	86	-1.2%
% Of Properties Sold Over List	25.0%	30.8%	-18.8%
% Of List Price Received <i>(Average)</i>	97.1%	99.0%	-1.9%

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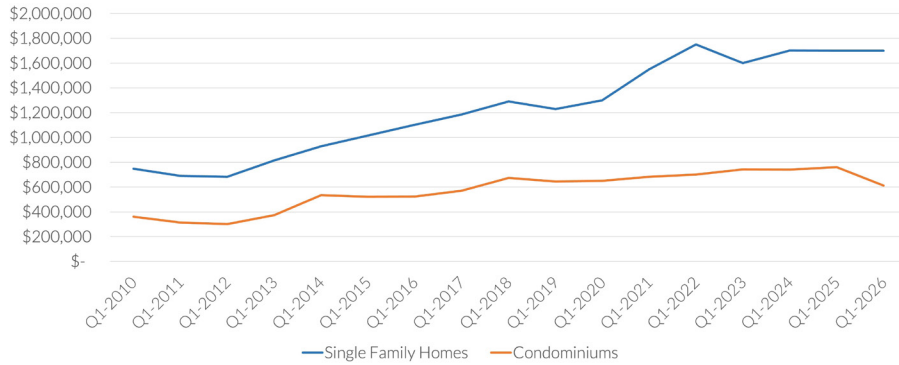
CONDOMINIUMS

REGION	HOMES SOLD (TOTAL)			DAYS ON MARKET (MEDIAN)			SALE PRICE (MEDIAN)		
	Q1-2026	Q1-2025	%Δ	Q1-2026	Q1-2025	%Δ	Q1-2026	Q1-2025	%Δ
Belvedere	0	0	-	-	-	-	-	-	-
Corte Madera	3*	1*	▲ 200%	43	12	▲ 258%	\$665,000	\$629,000	▲ 6%
Fairfax	0	0	-	-	-	-	-	-	-
Greenbrae	4*	5*	▼ 20%	9	59	▼ 85%	\$592,500	\$820,000	▼ 28%
Kentfield	0	0	-	-	-	-	-	-	-
Larkspur	2*	3*	▼ 33%	22	2	▲ 1000%	\$619,250	\$685,000	▼ 10%
Mill Valley	8*	10*	▼ 20%	35	10	▲ 250%	\$1,148,750	\$1,115,000	▲ 3%
Novato	18*	12*	▲ 50%	28	34	▼ 18%	\$516,500	\$495,000	▲ 4%
Ross	0	0	-	-	-	-	-	-	-
San Anselmo	*2	0	-	51	-	-	\$682,500	-	-
San Rafael	29*	21*	▲ 38%	43	31	▲ 39%	\$535,000	\$502,000	▲ 7%
Sausalito	5*	7*	▼ 29%	32	25	▲ 28%	\$920,500	\$970,000	▼ 5%
Stinson Beach	0	0	-	-	-	-	-	-	-
Tiburon	3*	6*	▼ 50%	156	57	▲ 174%	\$1,035,000	\$1,328,500	▼ 22%
MARIN COUNTY	76	65	▲ 17%	33	31	▲ 6%	\$611,250	\$760,000	▼ 20%

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YEAR-OVER-YEAR COMPARISONS

MEDIAN SALE PRICE



Single Family Residences

\$1,700,000

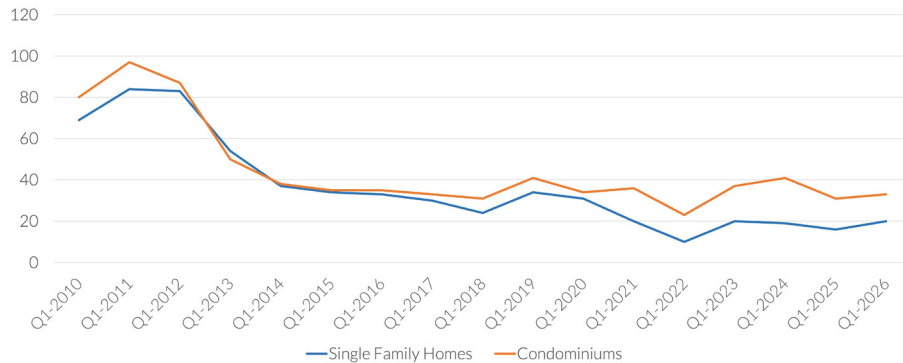
No change year-over-year

Condominiums

\$611,250

-19.6% change year-over-year

MEDIAN MARKET TIME



Single Family Residences

20 days

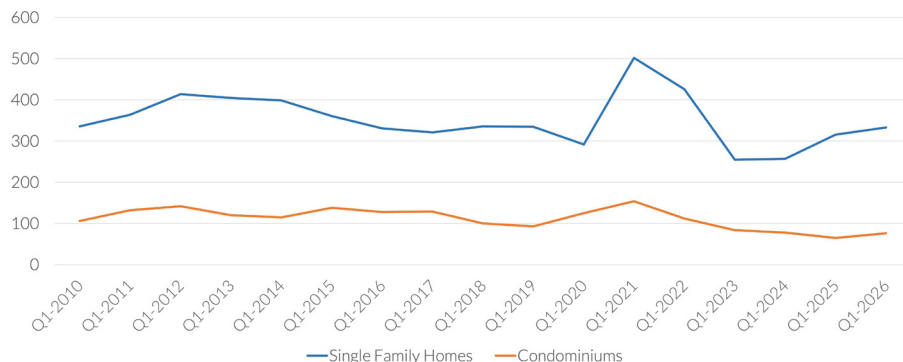
+4 day change year-over-year

Condominiums

33 days

+2 day change year-over-year

NUMBER OF SALES



Single Family Residences

333

+5.4% change year-over-year

Condominiums

76

+16.9% change year-over-year

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