



MARIN COUNTY MARKET UPDATE

AUGUST 2025





VANGUARD PROPERTIES

MARKET UPDATE

MARIN COUNTY | AUGUST 2025

After a busy second quarter, Marin County's housing market eased into its typical summer slowdown in July. While activity tapered from spring's brisk pace, the single-family home segment remains solid, and the seasonal pause is in line with historical trends. Summer often brings a bit more breathing room for buyers, while fall typically ushers in renewed activity and competitive conditions.

The median sales price for single-family homes rose 4.3% year over year to \$1,162,500, reflecting steady demand despite the seasonal cooling. Homes took longer to sell, with the median days on market increasing by 9 days to 33, though this remains relatively swift compared to pre-pandemic norms. The median price per square foot ticked down just 0.4%, indicating stable values.

Sales activity softened, with properties going into escrow down 9.8% and closed sales falling 11.7%. However, inventory grew meaningfully: the number of homes for sale on the last day of July jumped 36.2% to 316, offering buyers more options. Competition remained healthy, with just under a third of homes selling above list price. Sellers received 99.5% of asking on average, a slight 1.1% dip from last year. The Months Supply of Inventory (MSI) recorded at 1.9, still favoring sellers but offering more balance than earlier in the year.



SINGLE FAMILY HOMES

JULY 2025

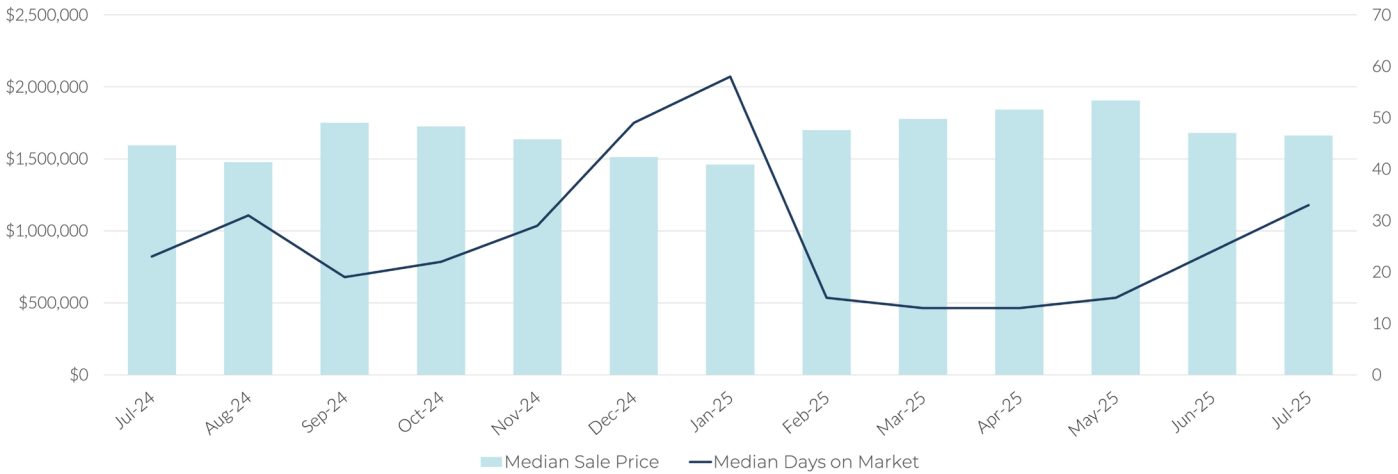
Median Sales Price	\$1,662,500 ↑
Days on market	33 ↑
\$ / SQ. FT.	\$836 ↓
# For Sale On Last Day Of Month	316 ↑
Went Into Contract	120 ↓
Properties Sold	166 ↓

MARIN COUNTY MARKET UPDATE

AUGUST 2025

SINGLE FAMILY RESIDENCES

MONTH-OVER-MONTH COMPARISON



CHANGE IN PAST MONTH:

SALES PRICE: **-1.0%**

DAYS ON MARKET: **+9 days**

YEAR-OVER-YEAR COMPARISON

"The median sales price for single-family homes rose 4.3% year over year to \$1,162,500, reflecting steady demand despite the seasonal cooling."

	MEDIAN		
	JUL-2025	JUL-2024	%Δ
Sales Price	\$1,662,500	\$1,594,000	+4.3%
Days On Market	33	23	+43.5%
\$ / SQ. FT.	\$836	\$839	-0.4%

	TOTAL		
	JUL-2025	JUL-2024	%Δ
Went Into Contract	120	133	-9.8%
Properties Sold	166	188	-11.7%
# For Sale Last Day of Month	316	232	+36.2%
% Of Properties Sold Over List	31.9%	38.3%	-16.7%
% Of List Price Received (Average)	99.5%	100.6%	-1.1%

MARIN COUNTY MARKET UPDATE

AUGUST 2025

YEAR-OVER-YEAR REGION COMPARISON

REGION	HOMES SOLD (TOTAL)			DAYS ON MARKET (MEDIAN)			SALE PRICE (MEDIAN)		
	Q2 2025	Q2 2024	%Δ	Q2 2025	Q2 2024	%Δ	Q2 2025	Q2 2024	%Δ
Belvedere	9*	9*	▲ 0%	56	30	▲ 87%	\$4,750,000	\$5,077,000	▼ 6%
Corte Madera	22*	26*	▼ 15%	19	9	▲ 111%	\$1,887,500	\$1,950,000	▼ 3%
Fairfax	27*	24*	▲ 13%	19	12	▲ 58%	\$1,200,000	\$1,272,500	▼ 6%
Greenbrae	13*	17*	▼ 24%	14	8	▲ 75%	\$2,425,000	\$1,850,000	▲ 31%
Kentfield	21*	30*	▼ 30%	17	12	▲ 42%	\$3,176,625	\$3,175,000	▲ 0%
Larkspur	19*	22*	▼ 14%	9	12	▼ 25%	\$2,730,000	\$2,857,500	▼ 4%
Mill Valley	100	83	▲ 20%	9	12	▼ 25%	\$2,345,000	\$2,405,000	▼ 2%
Novato	121	108	▲ 12%	21	17	▲ 24%	\$1,335,000	\$1,350,215	▼ 1%
Ross	12*	9*	▲ 33%	9	11	▼ 18%	\$3,325,000	\$4,762,000	▼ 30%
San Anselmo	53	40*	▲ 33%	14	14	0%	\$1,998,000	\$1,637,500	▲ 22%
San Rafael	129	115	▲ 12%	20	18	▲ 11%	\$1,525,000	\$1,575,000	▼ 3%
Sausalito	20*	13*	▲ 54%	17	27	▼ 37%	\$2,522,500	\$2,375,000	▲ 6%
Stinson Beach	3*	3*	0%	34	23	▲ 48%	\$6,900,000	\$4,000,000	▲ 73%
Tiburon	37*	25*	▲ 48%	25	30	▼ 17%	\$3,675,000	\$4,050,000	▼ 9%
MARIN COUNTY	606	545	▲ 11%	17	15	▲ 13%	\$1,802,508	\$1,800,000	0%

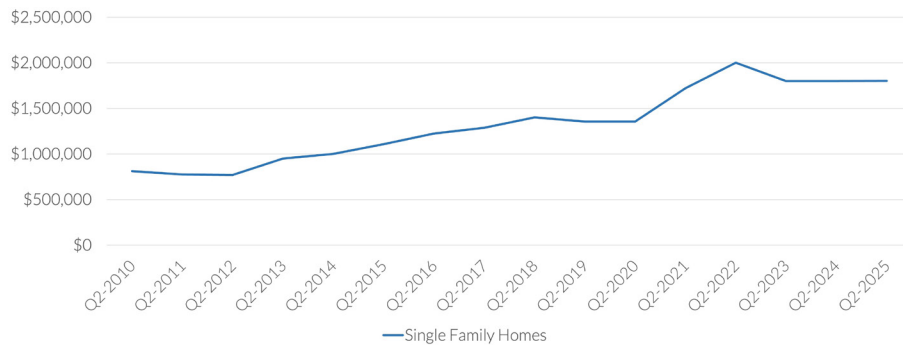
* Denotes small sample size; Use caution when interpreting results. Sources: SFAR Super Regional MLS & BrokerMetrics. Property types covered: Single-family. Only property data posted on the MLS is covered. All information is deemed reliable, but not guaranteed for accuracy. All data is subject to errors, omissions, revisions, and is not warranted. ©2025 Vanguard Properties. All rights reserved. Equal Housing Opportunity. DRE No. 01486075

MARIN COUNTY MARKET UPDATE

AUGUST 2025

YEAR-OVER-YEAR COMPARISONS

MEDIAN SALE PRICE

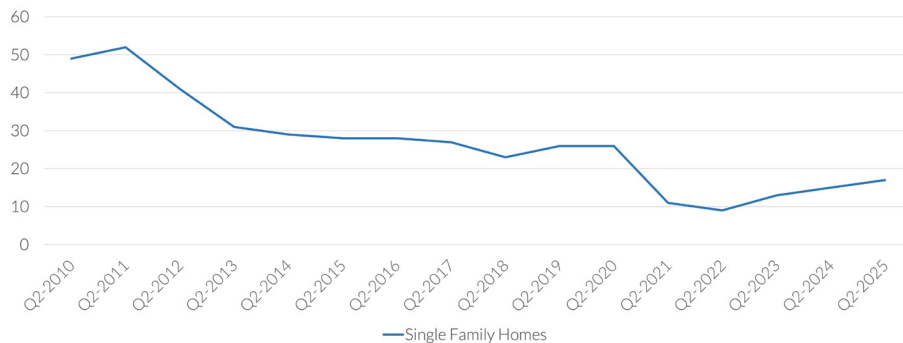


Single Family Residences

\$1,802,508

+0.1% change year-over-year

MEDIAN MARKET TIME

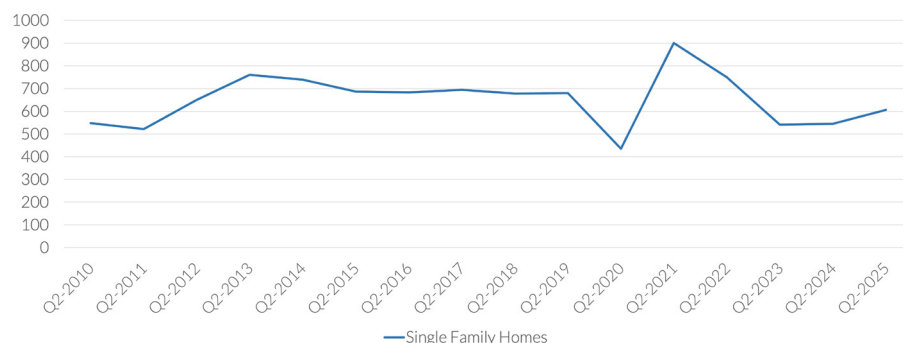


Single Family Residences

17 days

+2 day change year-over-year

NUMBER OF SALES



Single Family Residences

606

+11.2% change year-over-year