MARIN COUNTY MARKET UPDATE

AUGUST 2026

VANGUARD PROPERTIES

MARKET UPDATE

MARIN COUNTY | AUGUST 2026

Marin County's single family home market strengthened decisively in July, with the clearest shift visible in competition and speed. The share of homes selling over list price jumped from 31.9% to 51.0%, a 19.1 percentage point increase and nearly 60% higher than last year. Sellers also received an average of 103.7% of list price, compared with 99.5% in July 2025. Together, these figures show a meaningful return of seller leverage, particularly for desirable homes that were priced and presented well.

Homes sold in a median of just 19 days, 14 days faster than last July and a 42.4% year over year decline. That was Marin's fastest July market time since 2022 and the third fastest July in the 17 years shown in the historical data. Even during the typically quieter summer period, buyers moved quickly when the right properties became available.

The driving force remained a sharp imbalance between supply and demand. Marin ended July with only 205 single family homes for sale, down 35.1% from 316 one year earlier. Yet the decline in inventory did not reflect a lack of activity. Closed sales rose 19.3% to 198, the highest July total since 2021, while the number of homes going into contract increased 12.5% to 135. Buyers absorbed more homes despite having substantially fewer options, creating a notably tighter and more competitive market than last summer.

Pricing also moved higher. The median sales price increased 5.9% to $1,760,000, its highest July level since 2022 and close to the historical July peak. Median price per square foot rose 2.8% to $859. Although the median price eased from its spring high, the year over year gains in both overall price and price per square foot point to underlying strength rather than a shift in the mix of homes sold.

The broader economic backdrop remains supportive. Marin's unemployment rate was 4.0% in June, well below California's 5.2% rate, while the statewide rate reached its lowest level since May 2024, according to the California Employment Development Department. Nearby, San Francisco recorded nearly 964,000 square feet of positive office absorption during the second quarter, a constructive sign for the regional business environment, according to CBRE. Mortgage rates remain elevated but relatively stable, with the 30 year fixed rate averaging 6.67% as of August 13. Freddie Mac also noted recent increases in purchase and refinance applications, suggesting borrowers continue to respond when financing conditions improve even modestly.

SINGLE FAMILY HOMES

JULY 2026

Median Sales Price	$1,760,000 ↑
Days on market	19 ↓
$ / SQ. FT.	$859 ↑
# For Sale On Last Day Of Month	205 ↓
Went Into Contract	135 ↑
Properties Sold	198 ↑

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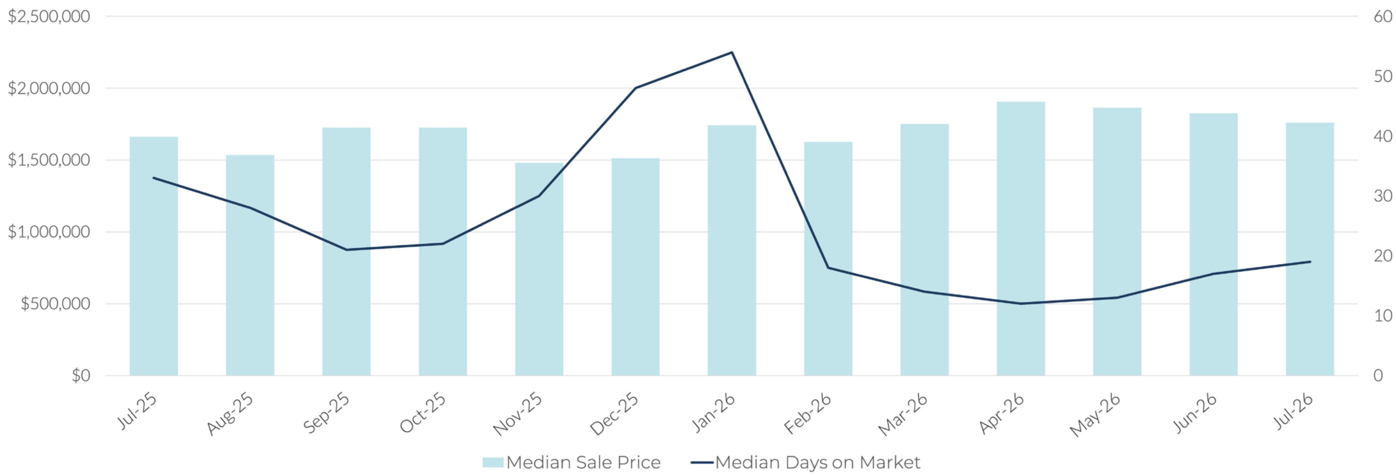
SINGLE FAMILY RESIDENCES

MONTH-OVER-MONTH COMPARISON



CHANGE IN PAST MONTH: SALES PRICE: **-3.6%** DAYS ON MARKET: **+2 days**

YEAR-OVER-YEAR COMPARISON

"The share of homes selling over list price jumped from 31.9% to 51.0%, a 19.1 percentage point increase and nearly 60% higher than last year. Sellers also received an average of 103.7% of list price, compared with 99.5% in July 2025."

MEDIAN

	JUL-2026	JULY-2025	%Δ
Sales Price	$1,760,000	$1,662,500	+5.9%
Days On Market	19	33	-42.4%
$ / SQ. FT.	$859	$836	+2.8%

TOTAL

	JUL-2026	JUL-2025	%Δ
Went Into Contract	135	120	+12.5%
Properties Sold	198	166	+19.3%
# For Sale Last Day of Month	205	316	-35.1%
% Of Properties Sold Over List	51.0%	31.9%	+59.9%
% Of List Price Received (Average)	103.7%	99.5%	+4.2%

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SINGLE FAMILY RESIDENCES

REGION	HOMES SOLD (TOTAL) Q2-2026	HOMES SOLD (TOTAL) Q2-2025	%Δ	DAYS ON MARKET (MEDIAN) Q2-2026	DAYS ON MARKET (MEDIAN) Q2-2025	%Δ	SALE PRICE (MEDIAN) Q2-2026	SALE PRICE (MEDIAN) Q2-2025	%Δ
Belvedere	13*	9*	▲ 44%	12	56	▼ 79%	$6,500,000	$4,750,000	▲ 37%
Corte Madera	28*	22*	▲ 27%	8	19	▼ 58%	$2,125,000	$1,887,500	▲ 13%
Fairfax	35*	27*	▲ 30%	14	19	▼ 26%	$1,260,000	$1,200,000	▲ 5%
Greenbrae	18*	13*	▲ 38%	12	14	▼ 14%	$2,592,500	$2,425,000	▲ 7%
Kentfield	16*	21*	▼ 24%	9	17	▼ 47%	$3,825,000	$3,176,625	▲ 20%
Larkspur	20*	19*	▲ 5%	13	9	▲ 44%	$3,620,000	$2,730,000	▲ 33%
Mill Valley	116	100	▲ 16%	9	9	0%	$2,630,000	$2,345,000	▲ 12%
Novato	136	121	▲ 12%	21	21	0%	$1,299,000	$1,335,000	▼ 3%
Ross	16*	12*	▲ 33%	10	9	▲ 11%	$5,000,000	$3,325,000	▲ 50%
San Anselmo	66	53	▲ 25%	9	14	▼ 36%	$1,735,000	$1,998,000	▼ 13%
San Rafael	150	129	▲ 16%	14	20	▼ 30%	$1,600,000	$1,525,000	▲ 5%
Sausalito	16*	20*	▼ 20%	8	17	▼ 53%	$2,975,000	$2,522,500	▲ 18%
Stinson Beach	9*	3*	▲ 200%	24	34	▼ 29%	$3,825,000	$6,900,000	▼ 45%
Tiburon	44*	37*	▲ 19%	10	25	▼ 60%	$3,461,000	$3,675,000	▼ 6%
MARIN COUNTY	713	606	▲ 18%	13	17	▼ 24%	$1,865,000	$1,802,508	▲ 3%

* *Denotes small sample size; Use caution when intrepreting 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.

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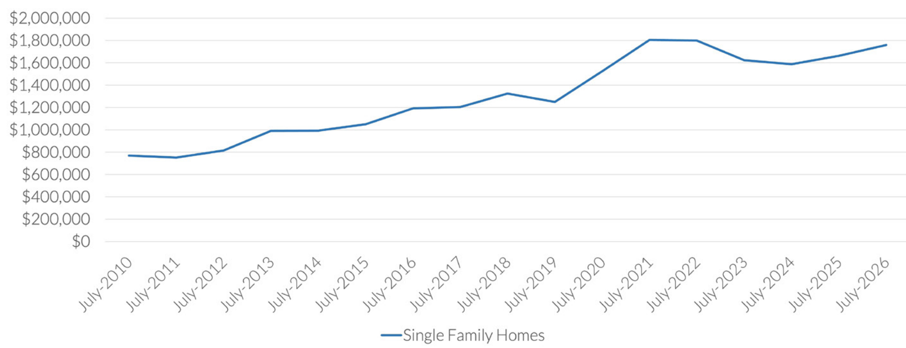
YEAR-OVER-YEAR COMPARISONS

MEDIAN SALE PRICE

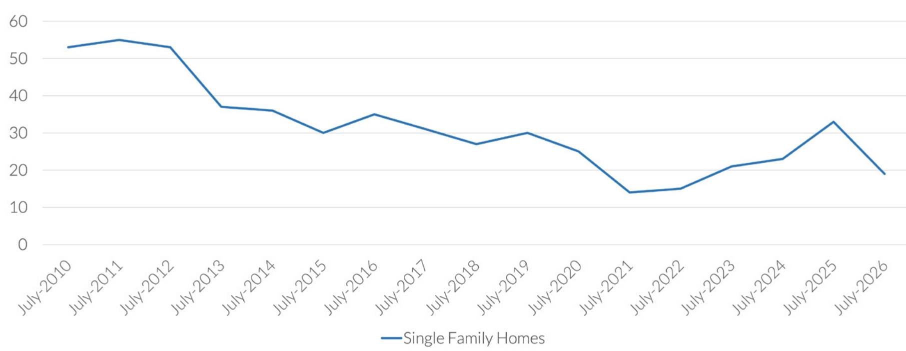


Single Family Residences

$1,760,000

+5.9% change year-over-year

MEDIAN MARKET TIME

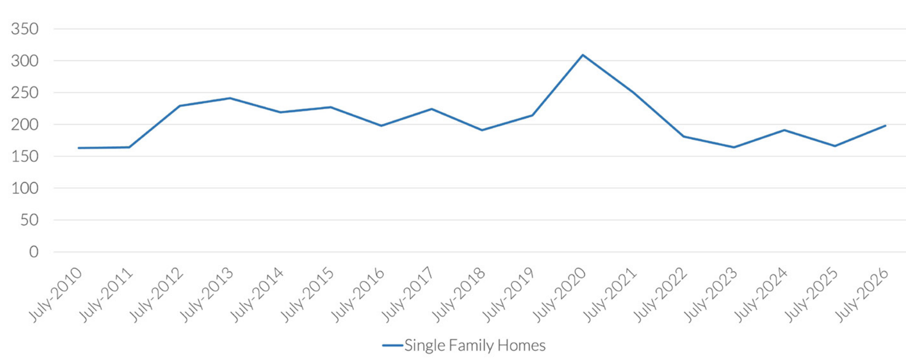


Single Family Residences

19 days

-14 day change year-over-year

NUMBER OF SALES



Single Family Residences

198

+19.3% change year-over-year

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