

MARIN COUNTY MARKET UPDATE

DECEMBER 2025





VANGUARD PROPERTIES

MARKET UPDATE

MARIN COUNTY | DECEMBER 2025

Marin's market continued its 2025 recalibration in November, shaped by higher inventory levels and typical late-year seasonality. The number of homes for sale rose 16.4 percent to 220, and this added supply contributed to more moderate pricing, with the median sales price down 9.5 percent to \$1,480,000 and the median price per square foot down 6.8 percent to \$801.

Even with these shifts, buyer engagement remained steady for this time of year. Closed sales increased 15.2 percent to 159, and homes still sold close to list value, with sellers receiving 100.7 percent of asking. Competitiveness also strengthened: 41.5 percent of homes sold over list, a 27.3 percent jump from last year, showing that well-presented properties continue to attract strong interest. Median days on market held at a seasonal pace of 30 days.

Overall, Marin is closing 2025 as a market in adjustment, balancing more robust inventory with steady demand, and positioning itself for a healthier, more active start to 2026.



SINGLE FAMILY HOMES

NOVEMBER 2025

Median Sales Price	\$1,480,000 ↓
Days on market	30 ↑
\$/ SQ. FT.	\$801 ↓
# For Sale On Last Day Of Month	220 ↑
Went Into Contract	104 ↓
Properties Sold	159 ↑

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SINGLE FAMILY RESIDENCES

MONTH-OVER-MONTH COMPARISON



CHANGE IN PAST MONTH:

SALES PRICE: **-14.2%**

DAYS ON MARKET: **+8 Days**

YEAR-OVER-YEAR COMPARISON

...buyer engagement remained steady for this time of year. Closed sales increased 15.2 percent to 159, and homes still sold close to list value."

	NOV-2025	NOV-2024	MEDIAN
Sales Price	\$1,480,000	\$1,635,000	-9.5%
Days On Market	30	29	+3.4%
\$/SQ. FT.	\$801	\$859	-6.8%

TOTAL

	NOV-2025	NOV-2024	%Δ
Went Into Contract	104	120	-13.3%
Properties Sold	159	138	+15.2%
# For Sale Last Day of Month	220	189	+16.4%
% Of Properties Sold Over List	41.5%	32.6%	+27.3%
% Of List Price Received (Average)	100.7%	100.8%	-0.1%

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YEAR-OVER-YEAR REGION COMPARISON

REGION	HOMES SOLD (TOTAL)			DAYS ON MARKET (MEDIAN)			SALE PRICE (MEDIAN)		
	Q3 2025	Q3 2024	%Δ	Q3 2025	Q3 2024	%Δ	Q3 2025	Q3 2024	%Δ
Belvedere	7*	6*	▲ 17%	28	39	▼ 28%	\$5,700,000	\$5,475,000	▲ 4%
Corte Madera	19*	24*	▼ 21%	17	13	▲ 31%	\$2,000,000	\$1,887,500	▲ 6%
Fairfax	29*	18*	▲ 61%	29	23	▲ 26%	\$1,205,000	\$1,250,000	▼ 4%
Greenbrae	7*	13*	▼ 46%	21	8	▲ 163%	\$1,725,000	\$2,775,000	▼ 38%
Kentfield	23*	16*	▲ 44%	40	21	▲ 90%	\$2,900,000	\$3,550,000	▼ 18%
Larkspur	14*	16*	▼ 13%	27	39	▼ 31%	\$2,867,500	\$2,404,000	▲ 19%
Mill Valley	67	64	▲ 5%	16	23	▼ 30%	\$2,300,000	\$2,054,000	▲ 12%
Novato	85	115	▼ 26%	31	25	▲ 24%	\$1,195,000	\$1,240,000	▼ 4%
Ross	8*	5*	▲ 60%	8	78	▼ 90%	\$3,297,500	\$2,180,000	▲ 51%
San Anselmo	28*	36*	▼ 22%	21	19	▲ 11%	\$1,692,500	\$1,449,750	▲ 17%
San Rafael	102	104	▼ 2%	28	22	▲ 27%	\$1,399,000	\$1,422,500	▼ -2%
Sausalito	16*	14*	▲ 14%	42	40	▲ 5%	\$2,072,500	\$1,900,000	▲ 9%
Stinson Beach	5*	5*	0%	47	28	▲ 68%	\$4,998,000	\$3,800,000	▲ 32%
Tiburon	26*	15*	▲ 73%	20	35	▼ 43%	\$3,537,500	\$2,800,000	▲ 26%
MARIN COUNTY	463	468	▼ 1%	27	24	▲ 13%	\$1,650,000	\$1,595,000	▲ 3%

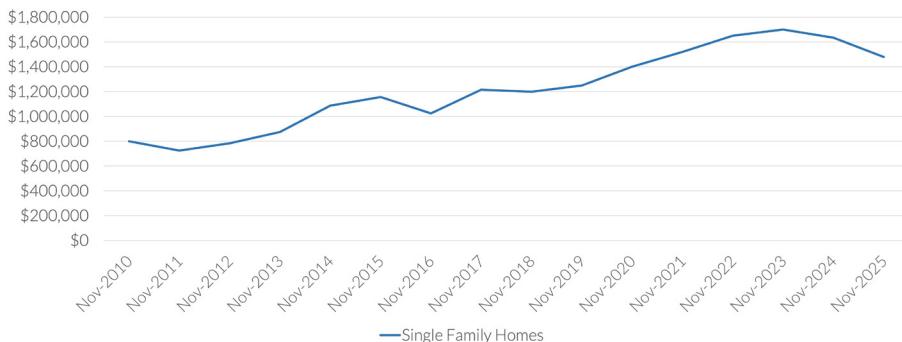
* Denotes small sample size; Use caution when interpreting results. Sources: SFAR Super Regional MLS & BrokerMetrics. Property types covered: Single-family. Only property data posted on the MLS is covered. All information is deemed reliable, but not guaranteed for accuracy. All data is subject to errors,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

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YEAR-OVER-YEAR COMPARISONS

MEDIAN SALE PRICE

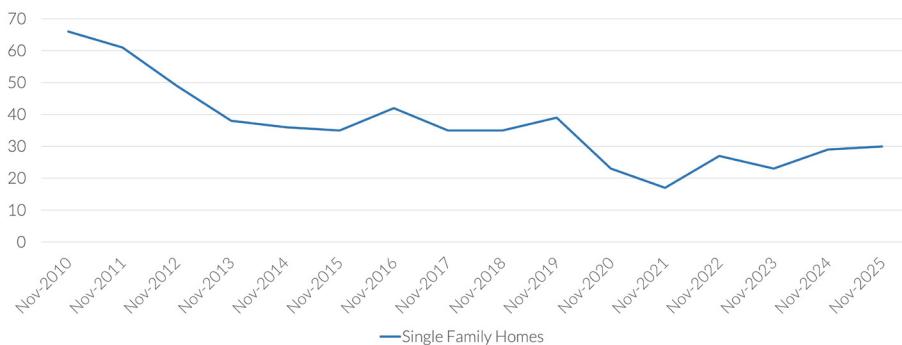


Single Family Residences

\$1,480,000

-9.5% change year-over-year

MEDIAN MARKET TIME

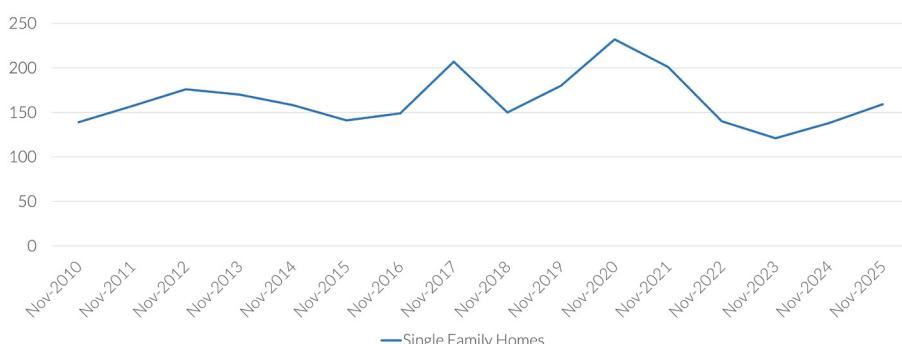


Single Family Residences

30 days

+1 day change year-over-year

NUMBER OF SALES



Single Family Residences

159

+15.2% change year-over-year