



# MARIN COUNTY MARKET UPDATE

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2025 YEAR IN REVIEW





## VANGUARD PROPERTIES

# MARKET UPDATE

### MARIN COUNTY | 2025 YEAR IN REVIEW

Marin County closed 2025 with more sales and contracts than the previous year, signaling that demand remained healthy even in a higher-inventory environment. The number of single-family homes going into contract climbed 9.0%, and closed sales rose 6.9%. At the same time, sellers still captured premium pricing; nearly 43% of homes sold above their list price, and sellers received an average of 101.2% of the asking price, only a slight dip from 2024. Although the median sale price edged down 0.3% to \$1,695,000, the typical home continued to command a strong per-square-foot value (down just 1.7% at \$853) and sold in 21 days—matching the previous year’s pace. Inventory averaged higher through much of the year, giving buyers more choice while still remaining balanced, and by year’s end there were 103 homes for sale, only 1.9% fewer than a year earlier.

Multiple forces supported Marin’s resilience. The county’s economy continued to outpace state and national growth; a 2025 economic report noted that Marin’s payroll employment growth accelerated late in 2024 and into 2025, with professional and technical services back to their pre-pandemic peak, healthcare adding jobs and house price appreciation keeping pace with the nation. Strong educational institutions, a burgeoning biotech sector, moderate inflation and lower costs relative to San Francisco helped keep consumer spending robust and attracted newcomers. By the second half of 2025, stock markets were hitting new highs and consumer confidence was improving. These factors, together with interest rates falling to their lowest level of the year, boosted buyer interest. Nationwide, the Bay Area’s housing market also gained momentum as AI-driven job growth and return-to-office trends lifted incomes and homebuying demand; Marin’s proximity to San Francisco allowed it to benefit from this surge.

The sharp drop in mortgage rates late in the year provided a final boost. Freddie Mac reported that the average 30-year fixed-rate mortgage fell from about 7% at the start of 2025 to 6.15% by 31 December, the lowest level of the year. This decline restored some buying power and spurred activity heading into 2026. Although bidding wars were less frequent than a year earlier, the market remained competitive for well-presented homes, and the rise in signed contracts indicates that buyers continued to act decisively when desirable properties became available.

Outlook for 2026: With a growing local economy, moderating inflation and a healthy pipeline of buyers, Marin is poised for a more active spring selling season. Rates are trending lower, inventory is balanced, and the county continues to attract high-income households seeking lifestyle amenities and proximity to San Francisco. Sellers can expect sustained interest for well-priced homes, while buyers will find a market that offers more choice yet still rewards speed and preparation. Overall, 2025’s year-end numbers suggest that Marin’s brief recalibration has laid the groundwork for renewed momentum in the year ahead.



### SINGLE FAMILY HOMES

#### 2025

Median Sales Price	\$1,695,000 ↓
Days on market	21
\$ / SQ. FT.	\$853 ↓
# For Sale On Last Day Of Year	103 ↓
Went Into Contract	1,883 ↑
Properties Sold	1,864 ↑

## SINGLE FAMILY RESIDENCES

### MONTH-OVER-MONTH COMPARISON



CHANGE IN PAST MONTH:

SALES PRICE: **+2.2%**

DAYS ON MARKET: **+18 days**

### YEAR-OVER-YEAR COMPARISON

*“Marin County closed 2025 with more sales and contracts than the previous year, signalling that demand remained healthy even in a higher-inventory environment.”*

	2025	2024	%Δ
Sales Price	\$1,695,000	\$1,700,000	-0.3%
Days On Market	21	21	0.0%
\$/SQ. FT.	\$853	\$868	-1.7%

	2025	2024	%Δ
Went Into Contract	1,883	1,728	+9.0%
Properties Sold	1,864	1,743	+6.9%
# For Sale Last Day of Year	103	105	-1.9%
% Of Properties Sold Over List	42.8%	44.8%	-4.5%
% Of List Price Received <i>(Average)</i>	101.2%	101.6%	-0.4%

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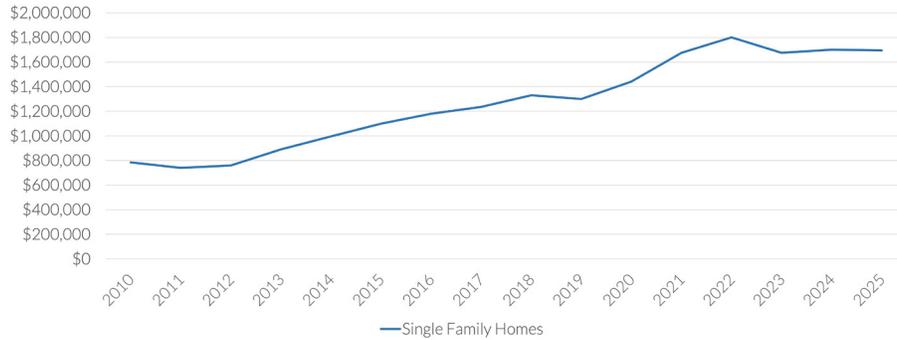
## YEAR-OVER-YEAR REGION COMPARISON

REGION	HOMES SOLD (TOTAL)			DAYS ON MARKET (MEDIAN)			SALE PRICE (MEDIAN)		
	2025	2024	%Δ	2025	2024	%Δ	2025	2024	%Δ
Belvedere	32*	28*	▲ 14%	57	39	▲ 46%	\$5,885,000	\$5,350,000	▲ 10%
Corte Madera	71	89	▼ 20%	18	14	▲ 29%	\$1,880,000	\$1,850,000	▲ 2%
Fairfax	91	62	▲ 47%	23	17	▲ 35%	\$1,150,000	\$1,200,000	▼ 4%
Greenbrae	32*	42*	▼ 24%	15	11	▲ 36%	\$2,200,000	\$2,180,000	▲ 1%
Kentfield	62	70	▼ 11%	20	18	▲ 11%	\$3,000,000	\$3,190,900	▼ 6%
Larkspur	56	68	▼ 18%	13	18	▼ 28%	\$2,612,500	\$2,575,000	▲ 1%
Mill Valley	300	275	▲ 9%	12	16	▼ 25%	\$2,281,000	\$2,250,000	▲ 1%
Novato	381	379	▲ 1%	25	24	▲ 4%	\$1,250,000	\$1,300,000	▼ 4%
Ross	29*	19*	▲ 53%	10	21	▼ 52%	\$3,400,000	\$3,250,000	▲ 5%
San Anselmo	132	131	▲ 1%	13	20	▼ 35%	\$1,815,000	\$1,625,000	▲ 12%
San Rafael	414	380	▲ 9%	26	21	▲ 24%	\$1,429,500	\$1,479,700	▼ 3%
Sausalito	69	38*	▲ 82%	20	25	▼ 20%	\$2,275,000	\$2,162,750	▲ 5%
Stinson Beach	11*	12*	▼ 8%	55	49	▲ 12%	\$5,150,000	\$3,900,000	▲ 32%
Tiburon	94	75	▲ 25%	23	28	▼ 18%	\$3,625,000	\$3,485,000	▲ 4%
MARIN COUNTY	1,864	1,743	▲ 7%	21	21	0%	\$1,695,000	\$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

## YEAR-OVER-YEAR COMPARISONS

### MEDIAN SALE PRICE



Single Family Residences

**\$1,695,000**

-0.3% change year-over-year

### MEDIAN MARKET TIME



Single Family Residences

**21 days**

No change year-over-year

### NUMBER OF SALES



Single Family Residences

**1,864**

+6.9% change year-over-year

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