



BUCKEYE
ROAD HOUSE

MARIN COUNTY
MARKET UPDATE

JUNE 2026





VANGUARD PROPERTIES

MARKET UPDATE

MARIN COUNTY | JUNE 2026

Marin County's single family home market moved into early summer with a familiar but powerful dynamic: more buyer activity, fewer available homes, faster market times, and stronger seller leverage. The biggest headline in May was the sharp decline in supply. The number of homes for sale at the end of the month fell 35% year over year to just 282 active listings. At the same time, closed sales rose 11% to 238, and the number of homes going into contract increased 5% to 235. In other words, buyers were more active than last year, but they had meaningfully fewer options to choose from.

That supply pressure showed up clearly in the competitiveness metrics. Nearly 6 in 10 homes sold over list price, with 59.2% of sales closing above asking, up 13.6% from last May. Sellers also received an average of 105.0% of list price, compared with 102.8% last year. Median days on market fell to just 13 days, two days faster than last year, which remains very quick by historical standards and points to a market where well-priced, well-presented homes are still moving decisively.

Pricing was more nuanced, but still healthy beneath the surface. The median sales price dipped 2.2% year over year to \$1,863,500, but the median price per square foot increased 2.0% to \$930. That suggests the slight decline in median price was likely influenced by mix, while underlying pricing strength remained intact.

Looking ahead, Marin remains well positioned for a strong early summer. Mortgage rates are still elevated, but Freddie Mac reported the 30-year fixed rate at 6.52% as of June 11, down from 6.84% one year earlier, giving buyers a modest affordability improvement compared with last summer. The broader Bay Area also continues to benefit from the AI-driven expansion cycle, with CBRE reporting that tech and AI companies leased more than 14 million square feet across San Francisco and Silicon Valley in 2025, accounting for 55% of total leasing activity. Equity markets have also been supportive, with the S&P 500, Dow, and Nasdaq all setting record highs in early June as AI-related stocks continued to lead market gains.

Overall, Marin's May data points to a market that is not just holding up, but tightening. Inventory is meaningfully lower, sales volume is higher, homes are selling quickly, and sellers are capturing stronger results relative to list price. For desirable, well-prepared homes, the market remains highly competitive. For buyers, the message is equally clear: opportunities still exist, but the best properties are moving fast.



SINGLE FAMILY HOMES

MAY 2026

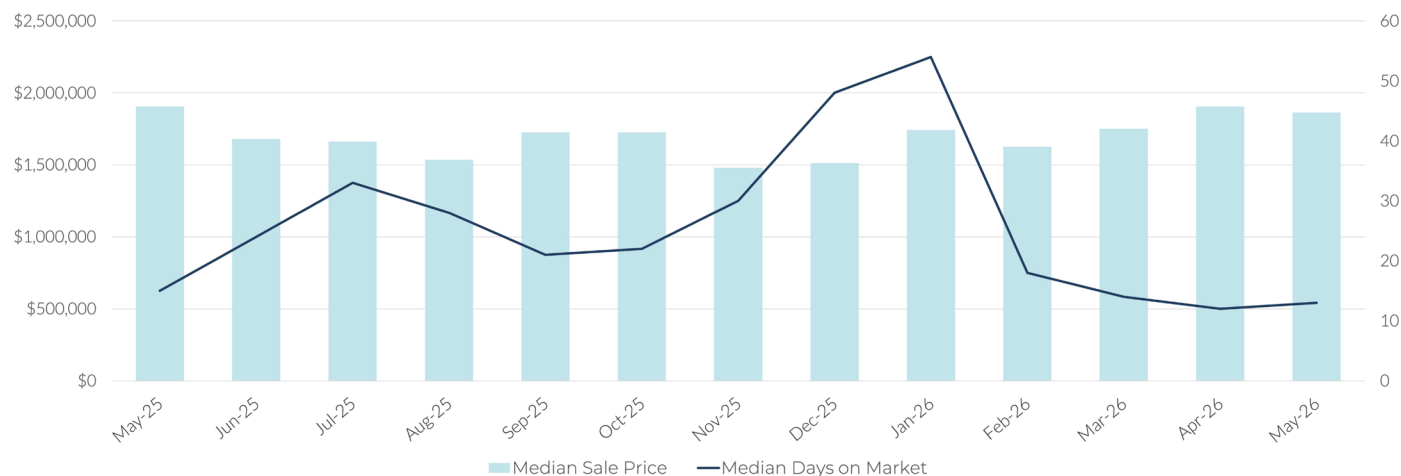
Median Sales Price	\$1,863,500 ↓
Days on market	13 ↓
\$ / SQ. FT.	\$930 ↑
# For Sale On Last Day Of Month	282 ↓
Went Into Contract	235 ↑
Properties Sold	238 ↑

MARIN COUNTY MARKET UPDATE

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SINGLE FAMILY RESIDENCES

MONTH-OVER-MONTH COMPARISON



CHANGE IN PAST MONTH:

SALES PRICE: **-2.2%**

DAYS ON MARKET: **+1 day**

YEAR-OVER-YEAR COMPARISON

"The number of homes for sale at the end of the month fell 35% year over year to just 282 active listings. At the same time, closed sales rose 11% to 238..."

	MEDIAN		
	MAY 2026	MAY 2025	%Δ
Sales Price	\$1,863,500	\$1,905,000	-2.2%
Days On Market	13	15	-13.3%
\$ / SQ. FT.	\$930	\$912	+2.0%

	TOTAL		
	MAY 2026	MAY 2025	%Δ
Went Into Contract	235	224	+4.9%
Properties Sold	238	215	+10.7%
# For Sale Last Day of Month	282	434	-35.0%
% Of Properties Sold Over List	59.2%	52.1%	+13.6%
% Of List Price Received <i>(Average)</i>	105.0%	102.8%	+2.1%

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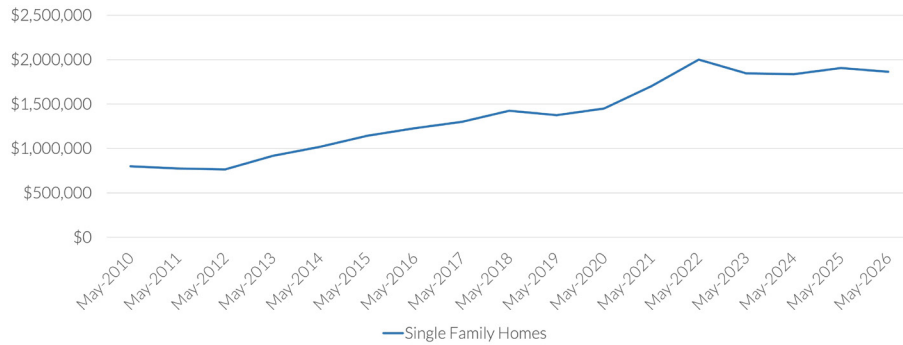
SINGLE FAMILY RESIDENCES

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

YEAR-OVER-YEAR COMPARISONS

MEDIAN SALE PRICE

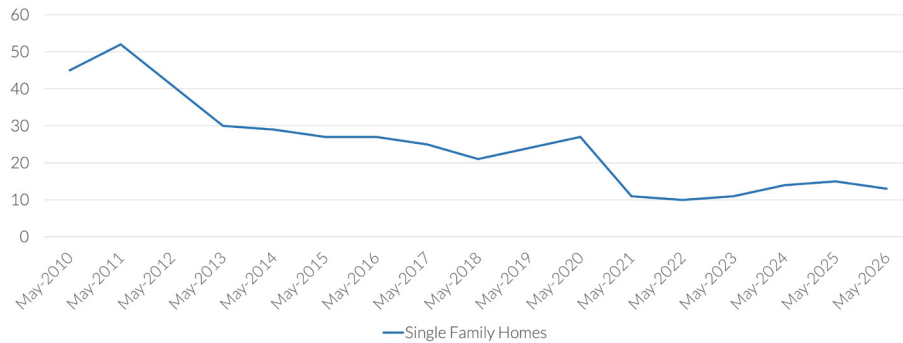


Single Family Residences

\$1,863,500

-2.2% change year-over-year

MEDIAN MARKET TIME

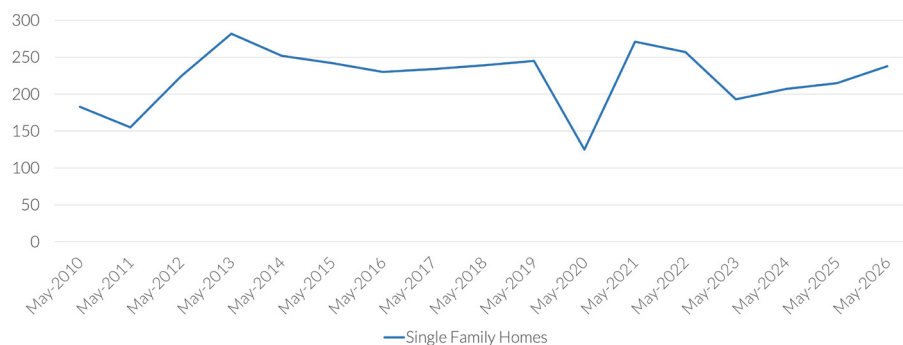


Single Family Residences

13 days

-2 day change year-over-year

NUMBER OF SALES



Single Family Residences

238

+10.7% change year-over-year

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