MARIN COUNTY MARKET UPDATE

Q3 2026

VANGUARD PROPERTIES

MARKET UPDATE

MARIN COUNTY | Q3 2026

Marin County's single-family home market strengthened in Q3 2026, as quarter-end inventory fell 30.3% from a year earlier while completed sales climbed 19.4% to 553. With just 271 homes available at quarter's end, buyers faced fewer choices and a more competitive market. Median selling time dropped 37.0%, from 27 days to 17, reinforcing the strength of demand relative to available supply.

Seller results reflected that increased competition. More than half of homes sold above asking, up from 37.4% in Q3 2025, while sellers received an average of 103.5% of list price, compared with 100.1% last year. The median sales price rose 6.7% to $1,760,000, supported by a similar 6.9% increase in median price per square foot to $886. Pending sales increased 6.0% to 494. Activity was particularly strong in San Rafael and Novato, where completed sales rose approximately 42% and 40%, respectively.

Condominiums also saw a substantial pickup in activity. Closed sales jumped 28.1% to 114, while pending sales increased 12.5% to 99. Inventory declined 10.0% to 90 units, and median selling time shortened by nine days to 45. Together, these figures show more transactions taking place against a smaller pool of available listings, although buyers continued to have more breathing room than in the single-family market.

Condominium pricing was more mixed. The median sales price increased 4.0% to $664,500, while median price per square foot slipped 1.9% to $567, suggesting that the mix of units sold may have contributed to the headline price gain. Sellers received an average of 99.4% of asking price, up from 97.8%, even as the share selling above asking eased from 24.7% to 21.1%. The improvement was primarily in transaction activity and sales closing nearer to asking price.

Recent economic reports provide positive context. California added 39,400 payroll jobs in August, and the Bureau of Economic Analysis' September 30 release revised second-quarter U.S. economic growth upward to a 2.2% annualized pace. Financing costs remain a consideration, with Freddie Mac's average 30-year fixed mortgage rate at 7.40% on October 8.

SINGLE FAMILY HOMES

Q3 2026

Median Sales Price	$1,760,000 ↑
Days on market	17 ↓
$ / SQ. FT.	$886 ↑
# For Sale On Last Day Of Quarter	271 ↓
Went Into Contract	494 ↑
Properties Sold	553 ↑

CONDOMINIUMS

Q3 2026

Median Sales Price	$664,500 ↑
Days On Market	45 ↓
$ / Sq. Ft.	$567 ↓
# For Sale Last Day Of Quarter	90 ↓
Went Into Contract	99 ↑
Properties Sold	114 ↑

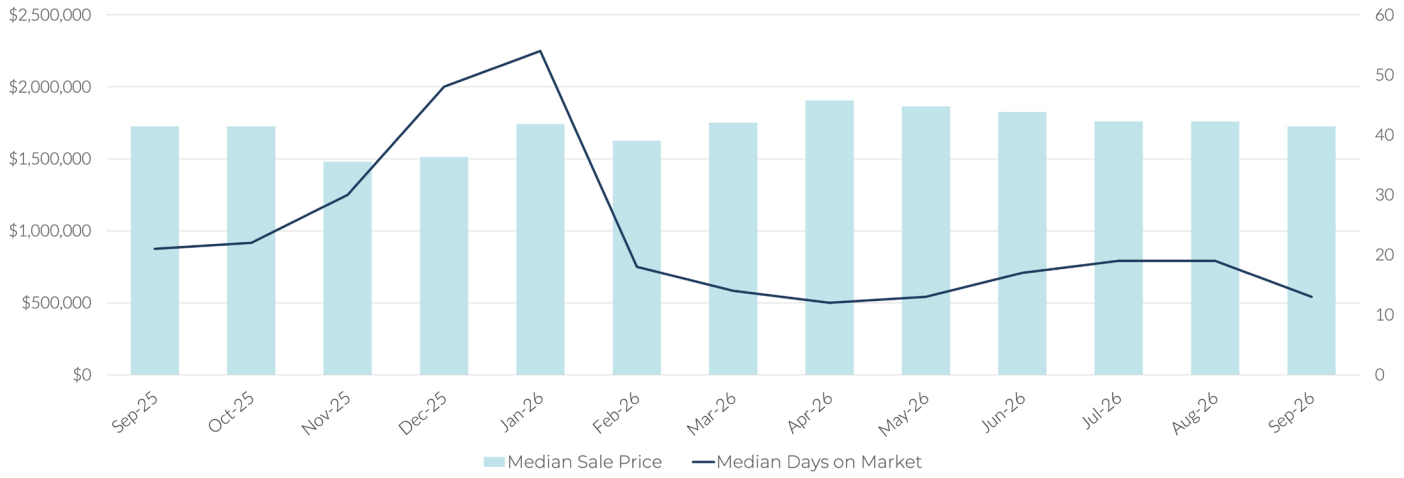
Sources: SFAR Super Regional MLS & BrokerMetrics; Property types covered: Single-family. Only property data posted on the MLS is covered. All information is deemed reliable, but not guaranteed for accuracy. All data is subject to errors, omissions, revisions, and is not warranted. ©2026 Vanguard Properties. All rights reserved. Equal Housing Opportunity. DRE No. 01486075

MARIN COUNTY MARKET UPDATE

Q3 2026

SINGLE FAMILY RESIDENCES

MONTH-OVER-MONTH COMPARISON



CHANGE IN PAST MONTH:

SALES PRICE: **-2.0%**

DAYS ON MARKET: **-6 days**

YEAR-OVER-YEAR COMPARISON

"The median sales price rose 6.7% to $1,760,000, supported by a similar 6.9% increase in median price per square foot to $886. Pending sales increased 6.0% to 494. Activity was particularly strong in San Rafael and Novato, where completed sales rose approximately 42% and 40%, respectively."

MEDIAN

	Q3-2026	Q3-2025	%Δ
Sales Price	$1,760,000	$1,650,000	+6.7%
Days On Market	17	27	-37.0%
$ / SQ. FT.	$886	$829	+6.9%

TOTAL

	Q3-2026	Q3-2025	%Δ
Went Into Contract	494	466	+6.0%
Properties Sold	553	463	+19.4%
# For Sale Last Day of Quarter	271	389	-30.3%
% Of Properties Sold Over List	51.4%	37.4%	+37.4%
% Of List Price Received *(Average)*	103.5%	100.1%	+3.4%

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SINGLE FAMILY RESIDENCES

	HOMES SOLD (TOTAL)			DAYS ON MARKET (MEDIAN)			SALE PRICE (MEDIAN)		
REGION	Q3-2026	Q3-2025	%Δ	Q3-2026	Q3-2025	%Δ	Q3-2026	Q3-2025	%Δ
Belvedere	13*	7*	▲ 86%	11	28	▼ 61%	$6,300,000	$5,700,000	▲ 11%
Corte Madera	19*	19*	0%	12	17	▼ 29%	$2,070,000	$2,000,000	▲ 4%
Fairfax	18*	29*	▼ 38%	21	29	▼ 28%	$1,283,500	$1,205,000	▲ 7%
Greenbrae	9*	7*	▲ 29%	8	21	▼ 62%	$3,350,000	$1,725,000	▲ 94%
Kentfield	19*	23*	▼ 17%	20	40	▼ 50%	$3,500,000	$2,900,000	▲ 21%
Larkspur	20*	14*	▲ 43%	8	27	▼ 70%	$2,555,000	$2,867,500	▼ 11%
Mill Valley	63	67	▼ 6%	13	16	▼ 19%	$2,250,000	$2,300,000	▼ 2%
Novato	119	85	▲ 40%	25	31	▼ 19%	$1,211,982	$1,195,000	▲ 1%
Ross	7*	8*	▼ 13%	20	8	▲ 150%	$3,895,000	$3,297,500	▲ 18%
San Anselmo	36*	28*	▲ 29%	12	21	▼ 43%	$1,775,000	$1,692,500	▲ 5%
San Rafael	145	102	▲ 42%	16	28	▼ 43%	$1,651,000	$1,399,000	▲ 18%
Sausalito	14*	16*	▼ 13%	18	42	▼ 57%	$1,945,000	$2,072,500	▼ 6%
Stinson Beach	7*	5*	▲ 40%	63	47	▲ 34%	$5,687,500	$4,998,000	▲ 14%
Tiburon	35*	26*	▲ 35%	15	20	▼ 25%	$3,300,000	$3,537,500	▼ 7%
MARIN COUNTY	**553**	**463**	**▲ 19%**	**17**	**27**	**▼ 37%**	**$1,760,000**	**$1,650,000**	**▲ 7%**

** 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. ©2026 Vanguard Properties. All rights reserved. Equal Housing Opportunity. DRE No. 01486075

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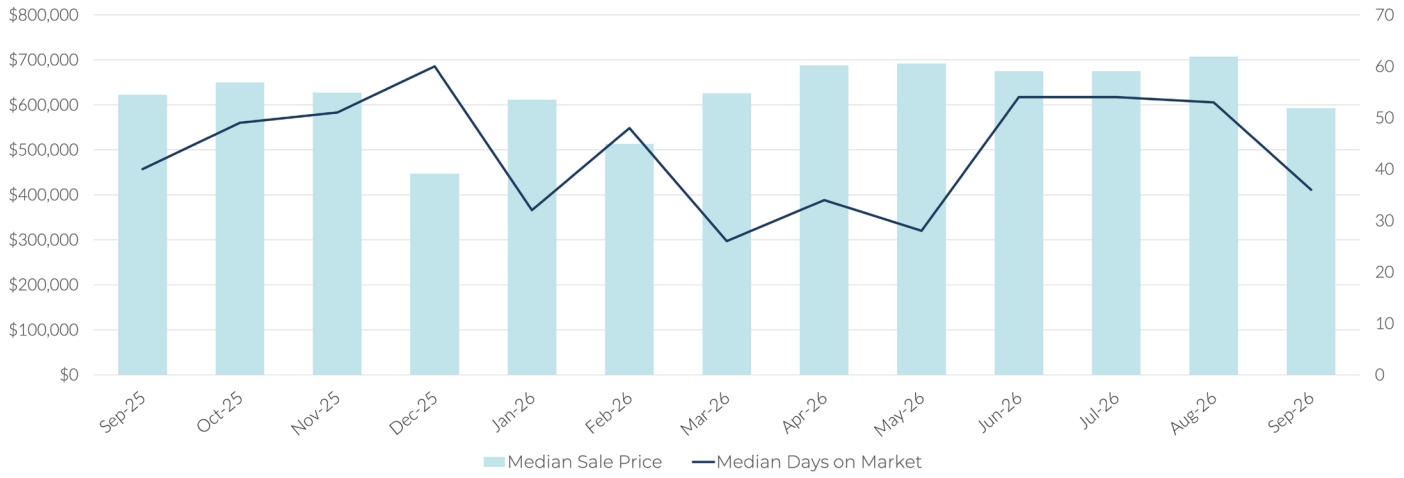
CONDOMINIUMS

MONTH-OVER-MONTH COMPARISON



CHANGE IN PAST MONTH:

SALES PRICE: **-16.3%**

DAYS ON MARKET: **-17 days**

YEAR-OVER-YEAR COMPARISON

"Condominiums also saw a substantial pickup in activity. Closed sales jumped 28.1% to 114, while pending sales increased 12.5% to 99."

MEDIAN

	Q3-2026	Q3-2025	%Δ
Sales Price	$664,500	$639,000	+4.0%
Days On Market	45	54	-16.7%
$ / SQ. FT.	$567	$578	-1.9%

TOTAL

	Q3-2026	Q3-2025	%Δ
Went Into Contract	99	88	+12.5%
Properties Sold	114	89	+28.1%
# For Sale Last Day of Quarter	90	100	-10.0%
% Of Properties Sold Over List	21.1%	24.7%	-14.6%
% Of List Price Received *(Average)*	99.4%	97.8%	+1.6%

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MARIN COUNTY MARKET UPDATE

Q3-2026

CONDOMINIUMS

REGION	HOMES SOLD (TOTAL) Q3-2026	HOMES SOLD (TOTAL) Q3-2025	%Δ	DAYS ON MARKET (MEDIAN) Q3-2026	DAYS ON MARKET (MEDIAN) Q3-2025	%Δ	SALE PRICE (MEDIAN) Q3-2026	SALE PRICE (MEDIAN) Q3-2025	%Δ
Belvedere	0	0	-	-	-	-	-	-	-
Corte Madera	5*	5*	0%	104	58	▲ 79%	$570,000	$710,000	▼ 20%
Fairfax	0	1*	▼ 100%	-	12	-	-	$533,000	-
Greenbrae	10*	6*	▲ 67%	89	52	▲ 71%	$705,000	$868,500	▼ 19%
Kentfield	1*	0	-	20	-	-	$595,000	-	-
Larkspur	4*	2*	▲ 100%	20	66	▼ 70%	$1,322,500	$863,500	▲ 53%
Mill Valley	13*	5*	▲ 160%	11	18	▼ 39%	$1,320,000	$1,390,000	▼ 5%
Novato	27*	26*	▲ 4%	45	40	▲ 13%	$520,000	$552,000	▼ 6%
Ross	0	0	-	-	-	-	-	-	-
San Anselmo	0	0	-	-	-	-	-	-	-
San Rafael	32*	27*	▲ 19%	54	76	▼ 29%	$530,000	$470,000	▲ 13%
Sausalito	13*	8*	▲ 63%	34	145	▼ 77%	$1,000,000	$705,000	▲ 42%
Stinson Beach	0	0	-	-	-	-	-	-	-
Tiburon	9*	9*	0%	23	50	▼ 54%	$1,370,000	$1,525,000	▼ 10%
MARIN COUNTY	**114**	**89**	**▲ 28%**	**45**	**54**	**▼ 17%**	**$664,500**	**$639,000**	**▲ 4%**

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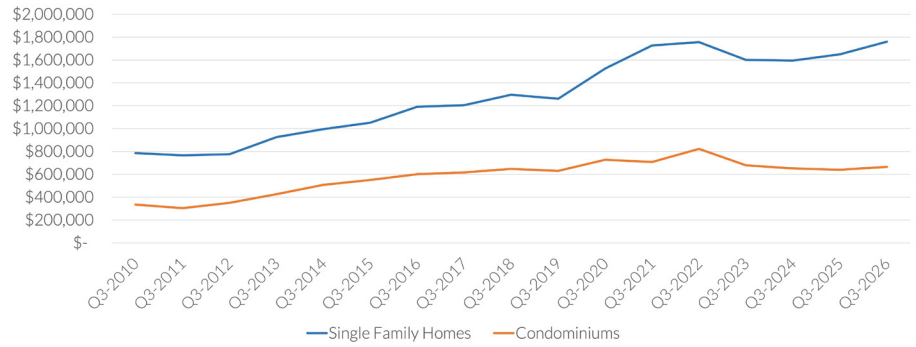
YEAR-OVER-YEAR COMPARISONS

MEDIAN SALE PRICE



Single Family Residences

$1,760,000

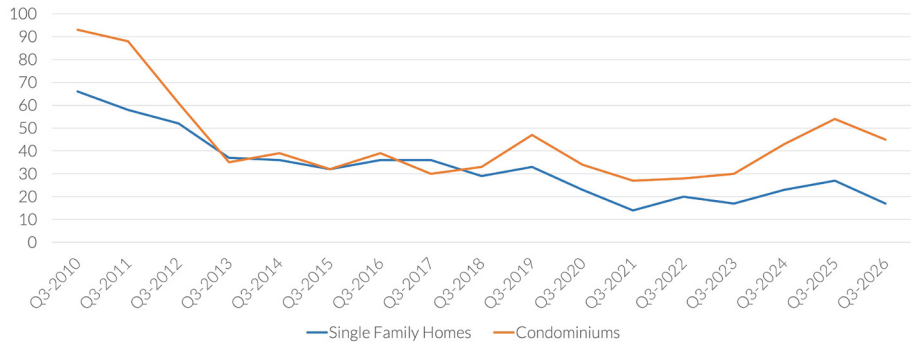
+6.7% change year-over-year

Condominiums

$664,500

+4.0% change year-over-year

MEDIAN MARKET TIME



Single Family Residences

17 days

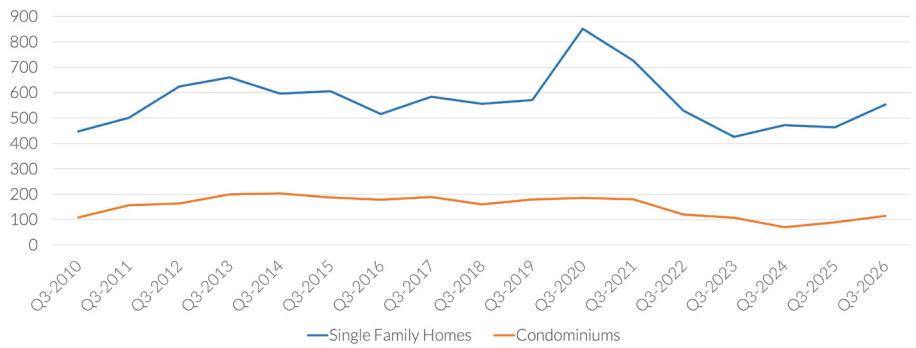
-10 day change year-over-year

Condominiums

45 days

-9 day change year-over-year

NUMBER OF SALES



Single Family Residences

553

+19.4% change year-over-year

Condominiums

114

+28.1% change year-over-year

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