



# MARIN COUNTY MARKET UPDATE

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MAY 2026





## VANGUARD PROPERTIES

# MARKET UPDATE

### MARIN COUNTY | MAY 2026

Marin County's single family home market entered spring with a healthy mix of rising sales, tighter inventory, faster market times, and stronger pricing. The clearest story in April was supply pressure. The number of homes for sale at the end of the month fell 26.1% year over year to 274 listings, while closed sales rose 18.8% to 228 and pending sales increased 10.8% to 226. That combination of fewer available homes and more completed transactions points to a market where buyers are active, but still competing for a limited number of well positioned properties.

Pricing also moved in the right direction. The median sales price increased 3.4% year over year to \$1,905,000, while the median price per square foot rose a stronger 5.9% to \$955. Homes continued to sell quickly, with median days on market falling to just 12 days, one day faster than last April. Sellers also achieved an average of 104.3% of list price, up from 103.4% last year, and 55.3% of homes sold over asking. While the share of homes selling over list was slightly below last year, the overall pricing picture remains strong, especially with buyers paying more per square foot and sellers receiving a higher percentage of their asking price.

Looking ahead, Marin appears well positioned for a competitive late spring and early summer market. Mortgage rates are still elevated, but they are running below last year's levels, with Freddie Mac reporting the 30 year fixed rate at 6.36% as of May 14, compared with 6.81% one year earlier. Rates also briefly dipped below 6% earlier this year for the first time in more than three years, giving buyers a glimpse of improved affordability and helping reengage some demand. At the same time, the broader Bay Area continues to benefit from strength in the AI economy, with major AI firms expanding their local office footprints and drawing talent, investment, and wealth into the region. That backdrop, combined with Marin's limited housing supply and enduring lifestyle appeal, should continue to support demand for well presented homes.



## SINGLE FAMILY HOMES

### APRIL 2026

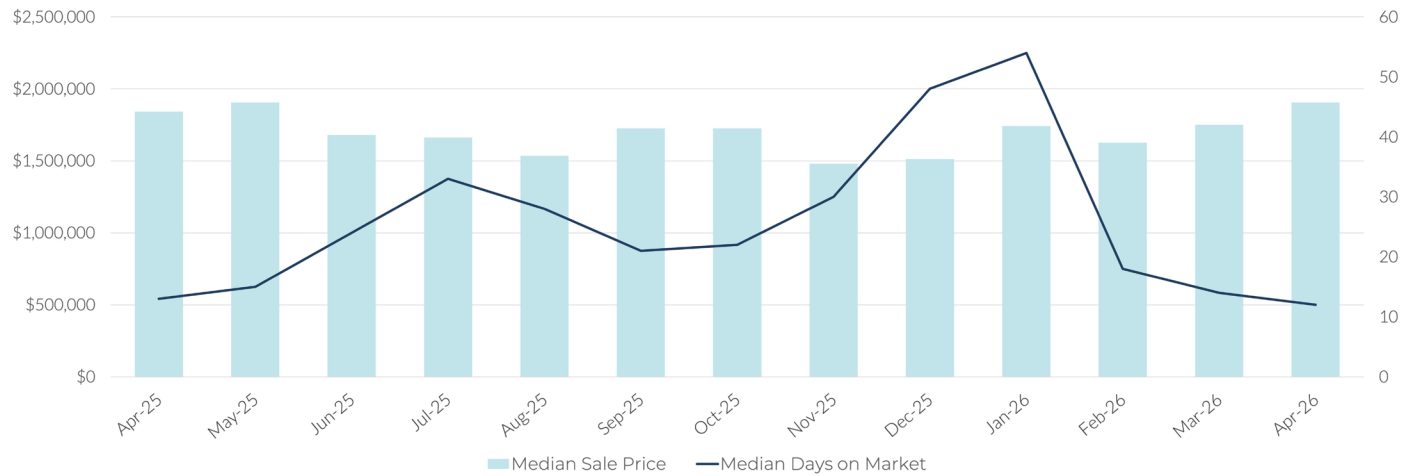
Median Sales Price	\$1,905,000 ↑
Days on market	12 ↓
\$ / SQ. FT.	\$955 ↑
# For Sale On Last Day Of Month	274 ↓
Went Into Contract	226 ↑
Properties Sold	228 ↑

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## SINGLE FAMILY RESIDENCES

### MONTH-OVER-MONTH COMPARISON



CHANGE IN PAST MONTH:

SALES PRICE: **+8.9%**

DAYS ON MARKET: **-2 days**

### YEAR-OVER-YEAR COMPARISON

*“Marin County’s single family home market entered spring with a healthy mix of rising sales, tighter inventory, faster market times, and stronger pricing.”*

	MEDIAN		
	APR-2026	APR-2025	%Δ
Sales Price	\$1,905,000	\$1,842,500	+3.4%
Days On Market	12	13	-7.7%
\$/SQ. FT.	\$955	\$902	+5.9%

	TOTAL		
	APR-2026	APR-2025	%Δ
Went Into Contract	226	204	+10.8%
Properties Sold	228	192	+18.8%
# For Sale Last Day of Month	274	371	-26.1%
% Of Properties Sold Over List	55.3%	56.3%	-1.8%
% Of List Price Received <i>(Average)</i>	104.3%	103.4%	+0.9%

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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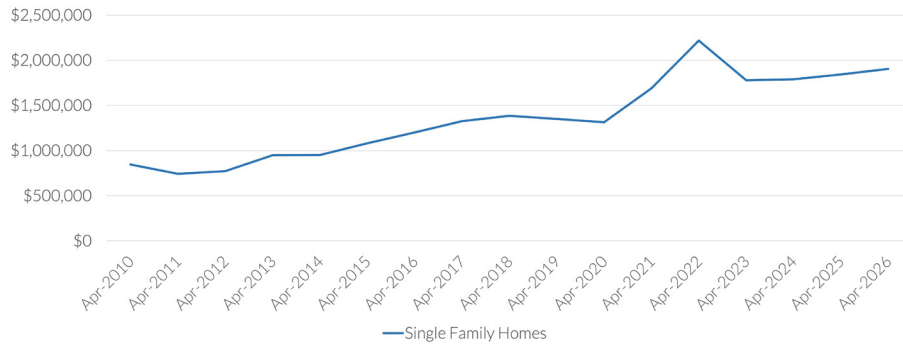
## SINGLE FAMILY RESIDENCES

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

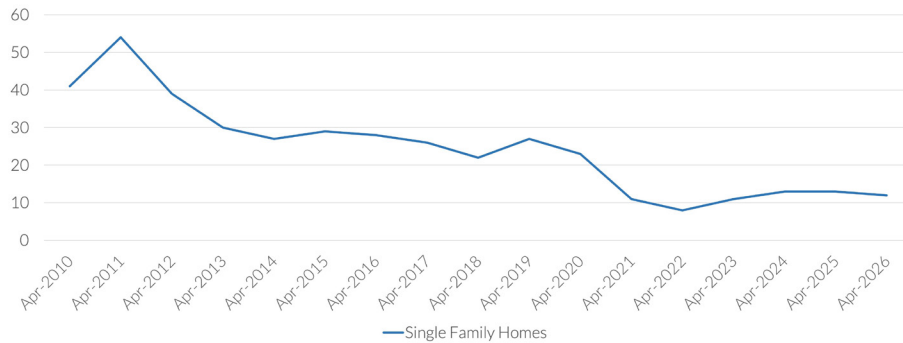


Single Family Residences

**\$1,905,000**

+3.4% change year-over-year

### MEDIAN MARKET TIME

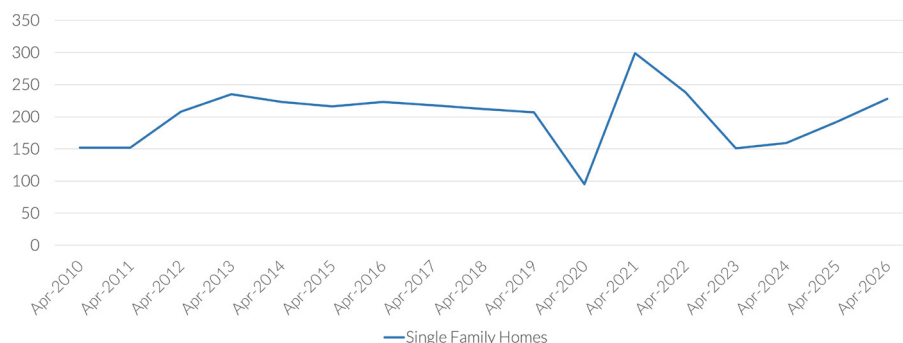


Single Family Residences

**12 days**

-1 day change year-over-year

### NUMBER OF SALES



Single Family Residences

**228**

+18.8% change year-over-year

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