



MARIN COUNTY MARKET UPDATE

NOVEMBER 2025





VANGUARD PROPERTIES

MARKET UPDATE

MARIN COUNTY | NOVEMBER 2025

Marin's housing market remains impressively steady heading into the end of 2025, marked by renewed activity and consistent pricing. While some numbers reflect stabilization after several active years, buyer engagement is picking up thanks to stronger contract activity and modestly higher inventory.

The most notable shift last month was in buyer activity — the number of homes that went into contract jumped 25% year over year to 201, the strongest pace since May. Inventory also rose 11% to 312 homes, giving buyers more options without upsetting the market's balance. Despite the increase in listings, competition stayed firm, with 44.5% of homes selling over list price (up 5.5% from last year) and sellers receiving an average of 101.9% of list price, a full percentage point higher than in 2024.

Pricing has held remarkably stable — the median sales price remained unchanged at \$1,725,000, and the median price per square foot stayed even at \$866. Homes continued to sell quickly, with a median of just 22 days on market, also unchanged from last year. These consistent figures underscore Marin's ongoing desirability and market strength, even as broader Bay Area trends have moderated.

With Months' Supply of Inventory (MSI) at 1.6, the market remains firmly in seller-favored territory, but buyers are finding more breathing room and opportunity to act strategically. The stability in prices, paired with slightly improving mortgage conditions, has created an encouraging environment for both sides of the table.

Overall, Marin continues to demonstrate long-term health and balance — a market defined less by volatility and more by quiet confidence. As the year winds down, steady pricing, stronger contract volume, and sustained demand are keeping Marin on solid footing heading into 2026.



SINGLE FAMILY HOMES

OCTOBER 2025

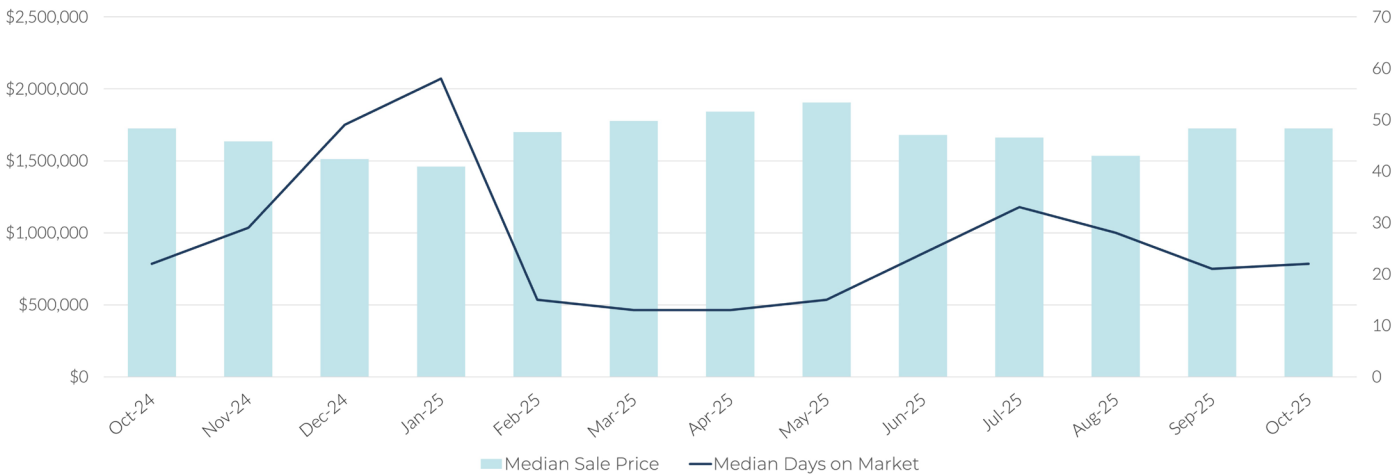
Median Sales Price	\$1,725,000
Days on market	22
\$ / SQ. FT.	\$866
# For Sale On Last Day Of Month	312 ↑
Went Into Contract	201 ↑
Properties Sold	191 ↓

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SINGLE FAMILY RESIDENCES

MONTH-OVER-MONTH COMPARISON



CHANGE IN PAST MONTH:

SALES PRICE: No Change

DAYS ON MARKET: +1 Day

YEAR-OVER-YEAR COMPARISON

“Marin’s housing market remains impressively steady heading into the end of 2025, marked by renewed activity and consistent pricing.”

	MEDIAN		
	OCT-2025	OCT-2024	%Δ
Sales Price	\$1,725,000	\$1,725,000	0.0%
Days On Market	22	22	0.0%
\$ / SQ. FT.	\$866	\$866	0.0%

	TOTAL		
	OCT-2025	OCT-2024	%Δ
Went Into Contract	201	161	+25.0%
Properties Sold	191	199	-4.0%
# For Sale Last Day of Month	312	281	+11.0%
% Of Properties Sold Over List	44.5%	42.2%	+5.5%
% Of List Price Received (Average)	101.9%	100.9%	+1.0%

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 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%

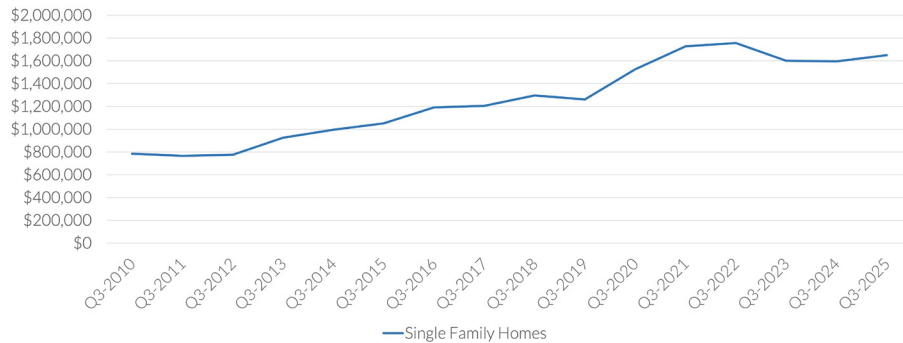
* Denotes small sample size; Use caution when interpreting results. Sources: SFAR Super Regional MLS & BrokerMetrics. Property types covered: Single-family. Only property data posted on the MLS is covered. All information is deemed reliable, but not guaranteed for accuracy. All data is subject to errors, 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

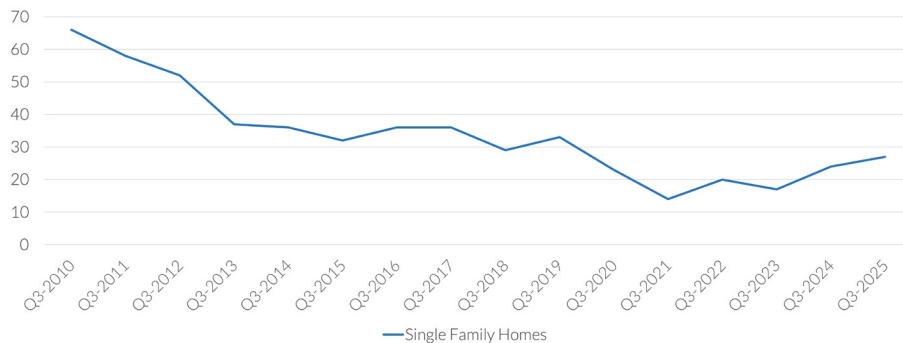


Single Family Residences

\$1,650,000

+3.4% change year-over-year

MEDIAN MARKET TIME

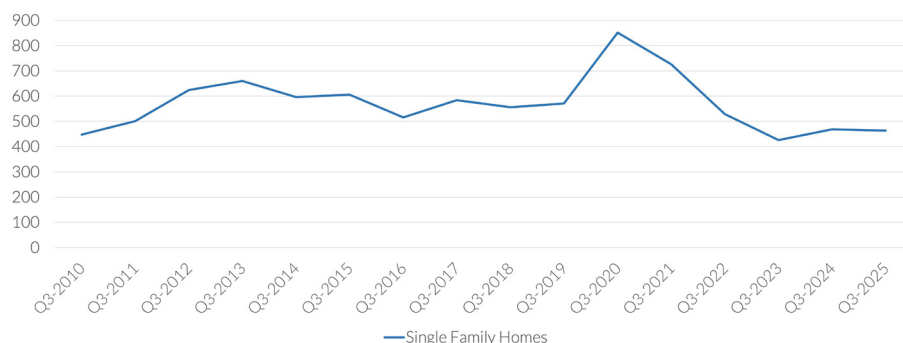


Single Family Residences

27 days

+3 day change year-over-year

NUMBER OF SALES



Single Family Residences

463

-1.1% change year-over-year