



MARIN COUNTY MARKET UPDATE

Q1 2025





VANGUARD PROPERTIES

MARKET UPDATE

MARIN COUNTY | Q1 2025

Marin County's real estate market showed strong momentum in the first quarter of 2025, with buyer activity on the rise and sales outpacing last year. Single-family home sales increased 25% year-over-year, signaling renewed confidence and engagement from buyers.

Inventory levels are up, offering buyers more choices. Active inventory for single-family homes is up 10% compared to Q1 2024, and the Months' Supply of Inventory (MSI) now stands at 1.1; a strong seller's market by any measure.

Despite the increase in inventory, homes are selling faster than last year, with the median days on market down to just 16 days; a low figure that underscores the competitiveness of the market.

On the financing side, mortgage rates dropped sharply following last week's announcement of new tariffs, giving buyers additional incentive to act; though volatility remains in play.

With strong demand, growing inventory, and faster market pace, Marin is well-positioned for an active and competitive spring season.



SINGLE FAMILY HOMES

Q1 2025

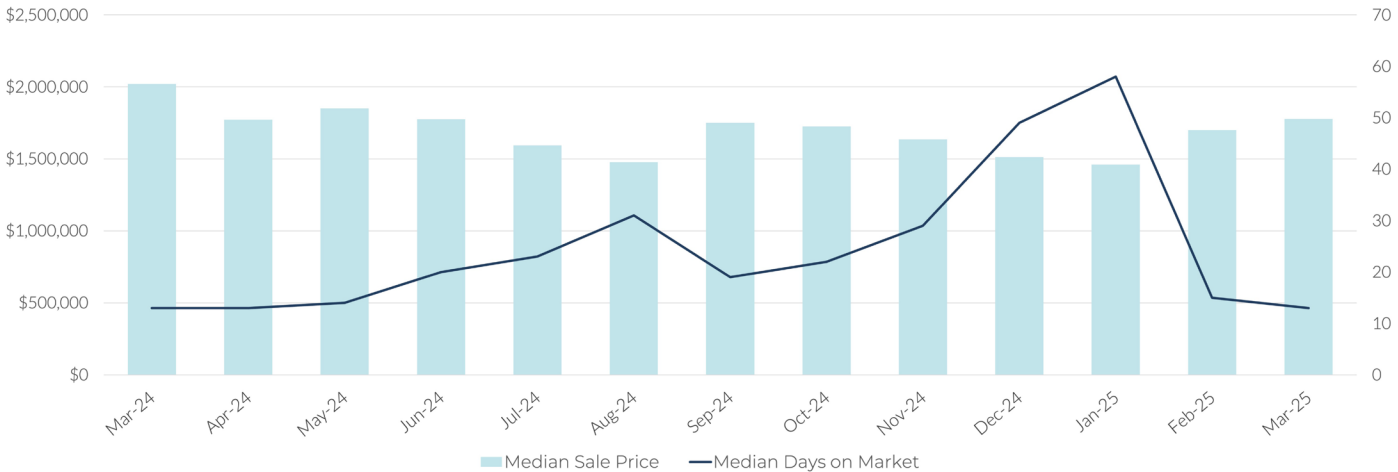
Median Sales Price	\$1,700,000
Days on market	16 ↓
\$ / SQ. FT.	\$824 ↓
# For Sale On Last Day Of Quarter	175 ↑
Went Into Contract	351 ↑
Properties Sold	316 ↑

MARIN COUNTY MARKET UPDATE

Q1 2025

SINGLE FAMILY RESIDENCES

MONTH-OVER-MONTH COMPARISON



CHANGE IN PAST MONTH:

SALES PRICE: **+4.6%**

DAYS ON MARKET: **-2 days**

YEAR-OVER-YEAR COMPARISON

"Single-family home sales increased 25% year-over-year, signaling renewed confidence and engagement from buyers."

	MEDIAN		
	Q1-2025	Q1-2024	%Δ
Sales Price	\$1,700,000	\$1,700,000	0.0%
Days On Market	16	19	-15.8%
\$ / SQ. FT.	\$824	\$867	-5.0%

	TOTAL		
	Q1-2025	Q1-2024	%Δ
Went Into Contract	351	278	+26.3%
Properties Sold	316	253	+24.9%
# For Sale Last Day of Quarter	175	159	+10.1%
% Of Properties Sold Over List	43.4%	46.2%	-6.1%
% Of List Price Received (Average)	101.3%	102.8%	-1.5%

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)		
	Q1 2025	Q1 2024	%Δ	Q1 2025	Q1 2024	%Δ	Q1 2025	Q1 2024	%Δ
Belvedere	7*	4*	▲ 75%	11	14	▼ 21%	\$6,007,000	\$5,288,500	▲ 14%
Corte Madera	8*	12*	▼ 33%	18	11	▲ 64%	\$1,742,500	\$1,947,500	▼ 11%
Fairfax	18*	2*	▲ 800%	25	20	▲ 25%	\$1,220,000	\$1,318,750	▼ 7%
Greenbrae	5*	6*	▼ 17%	9	12	▼ 25%	\$2,600,000	\$2,141,000	▲ 21%
Kentfield	7*	6*	▲ 17%	11	7	▲ 57%	\$2,650,000	\$2,860,000	▼ 7%
Larkspur	10*	10*	0%	9	18	▼ 50%	\$2,350,000	\$2,241,250	▲ 5%
Mill Valley	56	43*	▲ 30%	14	12	▲ 17%	\$2,150,000	\$2,077,000	▲ 4%
Novato	76	49*	▲ 55%	19	26	▼ 27%	\$1,303,000	\$1,357,000	▼ 4%
Ross	4*	1*	▲ 300%	11	42	▼ 74%	\$2,912,500	\$6,500,000	▼ 55%
San Anselmo	23*	20*	▲ 15%	12	12	0%	\$2,000,000	\$1,650,575	▲ 21%
San Rafael	59	65	▼ 9%	17	28	▼ 39%	\$1,525,000	\$1,487,000	▲ 3%
Sausalito	15*	5*	▲ 200%	23	47	▼ 51%	\$1,850,000	\$1,425,000	▲ 30%
Stinson Beach	1*	2*	▼ 50%	265	-	-	\$5,850,000	\$3,600,000	▲ 63%
Tiburon	10*	13*	▼ 23%	11	12	▼ 8%	\$4,087,000	\$3,907,000	▲ 5%
MARIN COUNTY	316	253	▲ 25%	16	20	▼ 20%	\$1,700,000	\$1,700,000	0%

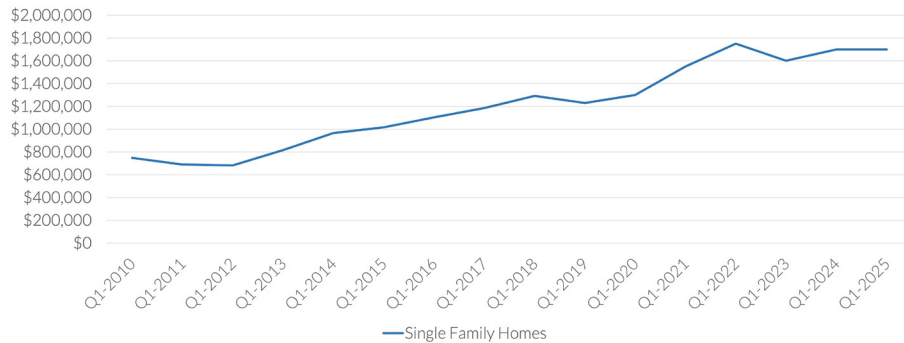
* Denotes small sample size; Use caution when interpreting results. Sources: SFAR Super Regional MLS & BrokerMetrics. Property types covered: Single-family. Only property data posted on the MLS is covered. All information is deemed reliable, but not guaranteed for accuracy. All data is subject to errors, omissions, revisions, and is not warranted. ©2025 Vanguard Properties. All rights reserved. Equal Housing Opportunity. DRE No. 01486075

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YEAR-OVER-YEAR COMPARISONS

MEDIAN SALE PRICE

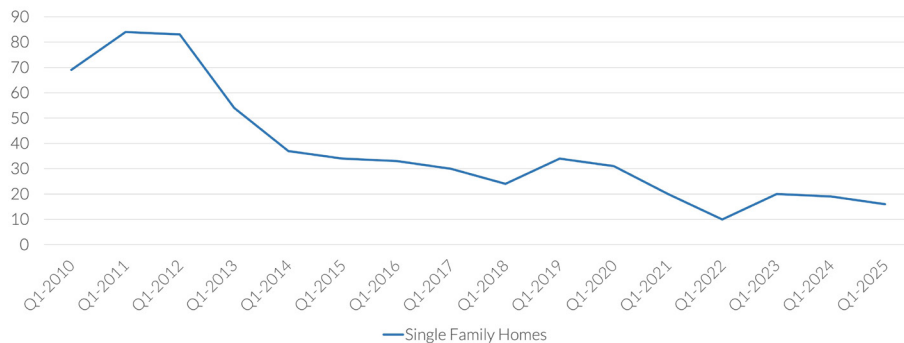


Single Family Residences

\$1,700,000

No change year-over-year

MEDIAN MARKET TIME

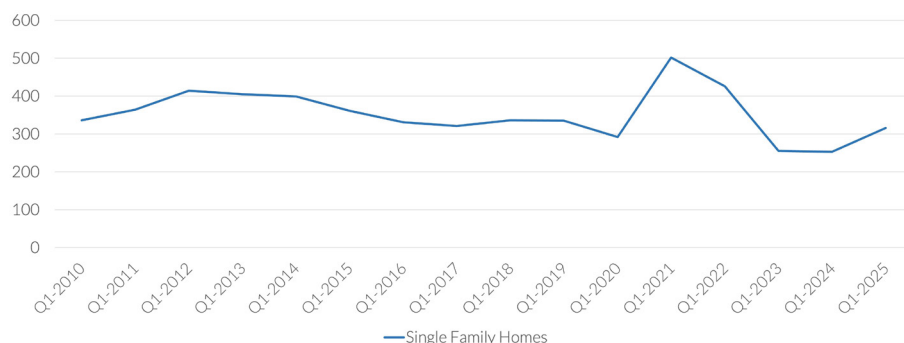


Single Family Residences

16 days

-3 day change year-over-year

NUMBER OF SALES



Single Family Residences

316

+24.9% change year-over-year